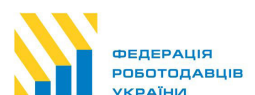




NATIONAL LABOUR MARKET SURVEY OF UKRAINE

2025-2026



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This report was prepared as a joint initiative of the State Employment Service of Ukraine, the Federation of Employers of Ukraine, and Helvetas Swiss Intercooperation.

The report is based on the results of a survey of nearly 61,000 employers and combines the analysis of official statistics and administrative data.

An integral part of this report is an online dashboard presenting the collected data by region, sector of economic activity, and occupation, available on the web-portal of the State Employment Service of Ukraine.

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All statements and views expressed in this report are those of the authors and do not necessarily reflect the official position of BMZ, JERU, or Helvetas.



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FOREWORD

Martial law in Ukraine has significantly changed economic processes and the conditions for business operations. The labour market is shaped by security risks, migration and demographic losses, mobilisation, destruction of infrastructure, disruptions in energy supply and logistics, and fluctuations in effective demand. Under such conditions, a significant share of employers focus not on rapid expansion but on maintaining production and key staff, which results in a combination of relative stabilisation with chronic structural imbalances in the labour market.

The issue of staffing critically important sectors and services (education, healthcare, energy, water supply, housing and communal services, industry and transport) becomes particularly important. Restoring and sustaining these systems requires predictable access to a qualified workforce, as well as adaptation of employment policies to new realities: changes in the age structure, a growing role of women in a number of occupations, more active involvement of veterans, IDPs, persons with disabilities, workers aged 60+, and youth without experience.

To study the current and prospective demand of employers for workers, the National Labour Market Survey of Ukraine was conducted in 2025 (September–October 2025), combining analysis of official statistics and administrative data with a large-scale survey of employers. In 2025, the survey coverage increased compared to 2024: the number of surveyed employers rose from 55 thousand to almost 61 thousand, and the number of employees working at these enterprises increased from 4.2 million to 4.4 million.

Key factors that determined the conduct of the survey:

- transformation of the economy and the labour market under martial law, and the need to support the resilience of enterprises and critically important sectors;
- changes in the employment structure due to migration, mobilisation, relocation of enterprises and demographic shifts;
- intensification of staff shortages and difficulties in recruiting workers in a number of types of economic activity, in particular in critical infrastructure;
- the need to update workers' competences and the spread of retraining/upskilling practices amid technological and organisational changes;
- the need to increase labour market inclusiveness and expand employment opportunities for vulnerable groups, in particular IDPs, veterans, persons with disabilities, persons aged 60+, and youth without experience;
- the growing role of labour market institutions, primarily the State Employment Service, as well as the vocational training system and other intermediaries, and the increasing importance of their services for employers (staff recruitment, training/retraining, support for employment of vulnerable groups).

The purpose of the survey is a comprehensive assessment of the current situation in Ukraine's labour market and employers' expectations for 2026, identification of imbalances between labour demand and supply, and identification of key trends in changing employers' needs for workers and skills.

Main objectives of the survey:

- identifying general employment trends and their regional specificities;
- assessing the impact of macroeconomic and security factors on enterprise activity, staffing decisions, and work organisation;
- analysing employers' current and prospective staffing needs (vacancies, hiring plans, most in-demand occupations);
- identifying the causes of recruitment difficulties and factors that intensify structural shortages;
- analysing employers' demand for skills, approaches to staff training, and attitudes towards qualification validation;
- assessing labour market inclusiveness (willingness to hire IDPs, veterans, persons with disabilities, youth without experience, workers aged 60+);
- analysing practices of social support for workers and staff retention measures (including remuneration, social programmes);
- assessing employers' interaction with the State Employment Service and factors influencing the level of trust and satisfaction with cooperation.

The employer survey was conducted during September–October 2025 (field stage), involving specialists from the regional units of the State Employment Service, who invited employers to participate, provided a link to an online questionnaire for self-completion and/or conducted interviews by phone. This approach ensured large-scale data collection and made it possible to generalise the results both nationwide and by key enterprise characteristics (region, size, types of economic activity), with a caveat for cautious interpretation where the number of responses is statistically limited, in particular regarding Luhansk and Donetsk oblasts. In addition, some respondents indicated that they conduct business activities throughout the territory of Ukraine rather than in a specific region.



The survey sample is representative at the oblast level. The sampling error for the territory of Ukraine where the survey was conducted is ± 0.39 p.p.; at the regional level, in 22 out of 25 oblasts the error does not exceed ± 3 p.p.

SUMMARY

The survey data indicate that by the end of 2025, Ukraine's labour market was operating in a mode of adaptation to prolonged wartime risks. For most enterprises, this meant not expansion but retention: 65% of employers did not change production volumes, and 63% did not change the number of staff. At the same time, stability did not mean an absence of problems: staff shortages became systemic, and competition for workers intensified, especially in sectors that provide basic services and critical infrastructure.

General trends

The economic environment in 2025 was shaped by security risks, energy constraints, rising costs, and tight financial conditions. In these circumstances, employers more often chose to increase resilience and productivity rather than rapid expansion. In 2025, 65.0% of enterprises reported no changes in production volumes, 13.4% reported growth, while 21.5% reported a decline. Expectations for 2026 are cautiously optimistic: the share of those forecasting growth is 21.7%, and the expected reduction is 11.1%. This confirms the stabilisation trend; however, it indicates that this is mainly about maintaining the current level of activity under external risks, rather than sustainable growth.

Current employment

The reduction in staff numbers during the first ten months of 2025 amounted to 2.8% (compared to 1.1% in 2024), while surveyed employers expected staffing levels to recover by the end of the year. An important feature of 2025 is that reductions became less widespread: the share of enterprises reporting reductions decreased to 21% (compared to 30% in 2024). At the same time, the main losses were concentrated among large employers. Overall, 63% of enterprises reported no changes in staff numbers, confirming the stabilisation trend, although it remains vulnerable.

There was a shift in the employment structure: the share of skilled workers decreased (from 42.9% in 2024 to 36.5% in 2025), while the share of professionals and specialists increased (from 22.7% in 2024 to 30.4% in 2025). This means that the economy was gradually increasing demand for more complex roles (managerial, engineering, socially significant) without reducing the need for blue-collar occupations.

Vacancies and staffing needs

In 2025, 27.3% of enterprises reported having vacancies, and the total number of open jobs exceeded 158 thousand (compared to 116 thousand in 2024). Importantly, over 57.5% of these vacancies were among employers who either reduced staff or did not change headcount – this indicates a structural staff shortage rather than expansion of activity. Planned hiring for 2026 (116.9 thousand persons) does not cover the existing need, so even with full implementation of plans, a gap of almost 41 thousand workers remains. The highest demand and the most difficult recruitment are observed in critical sectors: healthcare, education, water supply and waste management, energy, extractive and manufacturing industries.

Demand is distributed unevenly: although more than 2 thousand occupations are listed, 70% of vacancies account for only 105 occupations. The largest volumes of need are in blue-

collar occupations and technical roles. Examples of the most in-demand areas: drivers and operation of mobile equipment – 14.7 thousand persons (only drivers – 6.7 thousand persons); metallurgical and machine-building occupations – 13.0 thousand persons (welders – 2.0 thousand persons, fitters/locksmiths – 4.6 thousand persons); operators/machinists of industrial equipment – 9.2 thousand persons (machinists – 3.2 thousand persons); lecturers/teachers – 6.7 thousand persons (teacher – 2.3 thousand persons); other skilled workers with tools – 6.0 thousand persons (seamstress – 3.2 thousand persons). In 2025, 27.3% of enterprises reported having vacancies, and the total number of open jobs exceeded 158 thousand (compared to 116 thousand in 2024). Importantly, over 57.5% of these vacancies were among employers who either reduced staff or did not change headcount, indicating a structural staff shortage rather than an expansion of activity. Planned hiring for 2026 (116.9 thousand persons) does not cover the existing need, so even with full implementation of plans, a gap of almost 41 thousand workers remains. The highest demand and the most difficult recruitment are observed in critical sectors: healthcare, education, water supply and waste management, energy, and extractive and manufacturing industries.



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It should be noted separately that it is hardest to find exactly those who are most needed. The list of the most scarce includes drivers, teachers, managers, tractor driver-operators, childcare educators, seamstresses, nurses, family doctors, and cooks. This means that the problem is not limited to isolated cases but is reproduced from year to year.

Demographic and occupational-gender shifts

In 2025, demographic shifts intensified: the share of youth under 25 in the employment structure decreased from 6.4% to 4.7%, while the share of workers aged 60+ increased from 13.2% to 14.1%. The most illustrative sector is accommodation and food service activities, where the share of youth decreased from 25.8% to 1.1%, while in manufacturing the share of youth increased from 5.9% to 12.6%. This indicates that the problem is systemic, but its manifestations vary significantly depending on the type of activity.

The gender structure of employment in 2025 remained skewed towards men (55.4% versus 44.6% women). Female employment is strongly concentrated in healthcare, education, trade, and manufacturing. Despite some shifts, occupational segregation persists: employers' willingness to hire women for professions in which women are traditionally underrepresented decreased (from 57.1% in 2024 to 54.8% in 2025). Thus, the overall increase in labour market inclusiveness does not automatically translate into progress in the gender integration of occupations that are traditionally considered male-dominated.

Increase in labour market inclusiveness

In 2025, the share of vulnerable groups in the employment structure increased slightly: the share of persons with disabilities rose from 6.1% in 2024 to 6.5% in 2025; IDPs from 2.6% to 3.2%; and workers aged 60+ from 13.2% to 14.1%. At the same time, the share of combatants practically did not change (from 1.1% in 2024 to 1.0% in 2025), which may indicate barriers to returning to civilian employment and the need for specialised mechanisms of adaptation, retraining, and support.

Employers' hiring plans demonstrate a significant increase in openness to vulnerable groups: willingness to hire IDPs increased to 94.4% (78.6% in 2024), persons with disabilities to 88.0% (66.6% in 2024), combatants – to 91.0% (71.9% in 2024). This confirms the trend towards increasing inclusiveness as a practical business response to staff shortages.

Strengthening the role of training and social support

In 2025, staff training was organised by 33.7% of enterprises (compared to 31.4% in 2024). The increase is uneven: large enterprises intensified training activity (71.6% in 2025 versus 62.9% in 2024), while small and micro enterprises remain significantly less engaged. By sector, the highest training rates are in public administration, education, and healthcare (about 58–63% in 2025).

In contrast, social support is indeed a widespread practice: in 2025 it was offered by 51.2% of enterprises (48.7% in 2024). Common forms include compensation/organisation of transport, payment for communications, payment for training, and medical and psychological support. Psychological support in 2025 took first place as a response to high demand and the relatively low cost of such measures.

55.6% of employers plan to increase wages, but mostly within moderate limits (up to 10% or 10–20%). This shows that businesses are trying to retain people, but financial space is limited.



Growing trust in the State Employment Service

In 2025, cooperation with the SES intensified: the share of enterprises interacting with the service increased from 74.6% to 83.0%. The highest level of engagement is among large enterprises (93.5%), while the lowest is among micro enterprises. Kyiv City differs significantly, with a low level of interaction (29.5%), which may be explained by active use of private recruitment channels.

KEY FINDINGS AND RECOMMENDATIONS

The survey results demonstrate both a relative stabilisation of the situation and an intensification of structural imbalances in the labour market. Enterprises generally maintain production and employment, but staff shortages in critical sectors, demographic losses, and mismatches between vacancies and candidate profiles create risks for recovery. At the same time, the labour market is becoming more inclusive, and training and social support are turning into key tools for workforce resilience.

Positive trends

Stabilisation of employment and production. The majority of enterprises maintain production volumes (65% unchanged) and staff numbers (63% unchanged). This creates a basis for more predictable planning, despite the persistence of risks in frontline regions and certain industries, and it also constrains recovery and investment in expansion.

Increasing inclusiveness of the labour market. Employers are significantly more open to hiring IDPs, persons with disabilities, combatants, workers aged 60+, and youth without experience. This creates a reserve of labour for sectors facing staff shortages and increases the social resilience of communities.

Strengthening the role of training and social support. Social programmes covered more than half of employers, and training is increasing primarily in large businesses and in sectors of public importance. Against the backdrop of constraints on rapid wage growth, social support and training are becoming practical tools for retaining workers.

Growing trust in the SES. The increasing share of employers cooperating with the SES indicates an expanding role of the service in staff recruitment and in supporting the labour market amid structural gaps.

Main labour market challenges

Acute staff shortages in critical sectors. The increase in vacancies and growing recruitment difficulties are concentrated in water supply, energy, healthcare, education, and the extractive and manufacturing industries. A significant share of vacancies exists even at enterprises without employment growth, which indicates a lack of candidates with the required profile, as well as gaps between demand and supply in terms of qualifications, pay, and geography.

Employers' demand is highly concentrated by occupations. Although the report recorded thousands of titles, the main volume of need was concentrated in a relatively small group of occupations, meaning that the market rests on specific mass roles. The largest need in 2025 fell on blue-collar and technical occupations, as well as socially important positions.

The most scarce occupations largely coincide with the most in-demand ones. That is, the problem lies not only in the existence of vacancies, but in the difficulty of actually filling them, especially for drivers, technical blue-collar occupations, and teaching and medical positions.

Demographic "narrowing of entry" into the labour market. A decreasing share of youth and an increasing share of workers aged 60+ create a long-term risk for workforce reproduction, especially in physically demanding and critically important types of activity.

Slow occupational-gender changes. Despite the overall increase in inclusion, employers' willingness to hire women into professions in which women are traditionally underrepresented is declining. This indicates that overcoming gender segregation requires targeted measures and is not resolved automatically within the general trend of increasing inclusiveness.

Inequality of training opportunities between large and small businesses. Only one third of enterprises organise training, and the main increase is driven by large employers. For small and micro businesses, training is often financially challenging, which limits the speed of closing workforce gaps through on-the-job skills development.

Barriers to veteran employment. A small share of combatants among the employed, alongside a high declared willingness of employers to hire them, indicates the need for tools that connect the return-to-civilian-life stage with actual employment, in particular through adaptation, support, retraining, and flexible working conditions.

Recommendations for balancing the labour market

Development of retraining oriented to real demand in critical sectors. Priority should be given to short retraining and upskilling programmes for occupations with chronic staff shortages in water supply, energy, healthcare, education, and the extractive and manufacturing industries.

It is important that programmes are built on employers' demand and provide practical skills for rapid entry into work.

Support for small and micro businesses in staff skills development. It is advisable to expand co-financing instruments for training (vouchers, training grants, partnership programmes with educational institutions, short modules) specifically for small employers that lack resources to create internal training systems.

Systemic solutions for veteran employment. Specialised adaptation programmes are needed: assessment of existing skills, individual retraining pathways, workplace mentoring, and support for employers in creating working conditions and managing risks (including psychological support).

Strengthening youth engagement in the labour market. It is advisable to scale up internships, practical placements, dual formats, and first-job opportunities in cooperation between employers and vocational and higher education institutions. A specific focus: critical sectors where workforce ageing is observed.

Specific measures to overcome gender segregation. Targeted programmes are needed to engage women in technical and infrastructure occupations: short courses with practical skills, safe working conditions, mentoring, information campaigns, and work with employers on workplace organisation.

Further development of the service capacity of the SES. Given the growth in cooperation, it is advisable to strengthen individual support to employers, simplify administrative procedures, expand staff recruitment instruments, and strengthen labour market analytics in order to match vacancies and candidates faster, taking into account skill level, region, and pay expectations.

1. GENERAL EMPLOYMENT TRENDS

1.1. MACROECONOMIC DRIVERS OF CHANGE

By the end of 2025, Ukraine's economic environment was shaped by three groups of factors: security and energy supply, business costs and access to finance, and structural constraints in the labour market. In December 2025, enterprises cited as key constraints on business activity a deterioration in the security situation, prolonged power outages, destruction of production and logistics capacities, rising production costs, and a shortage of qualified staff. For the labour market, this meant a combination of two trends: high demand for workers in the more "resilient" sectors (able to operate despite risks/disruptions) and labour shortages in critical occupations, which put upward pressure on wages and forced employers to focus more on retaining staff than on rapidly expanding headcount.

In the second half of 2025, price growth became more manageable, reducing uncertainty for business planning. According to the State Statistics Service of Ukraine, consumer inflation in December 2025 was 0.2% compared to November 2025 and 8.0% compared to December 2024; core inflation was 0.1% month-on-month and 8.0% year-on-year. For the labour market, the practical implication was that even as inflation slowed towards the end of the year, employers still needed to raise or index wages (to retain staff), while headcount expansion was more often postponed due to high operating costs (energy, logistics, raw materials) and demand uncertainty in certain activities.

The Business Expectations Index (BEI), according to the National Bank of Ukraine, stood at 49.2 in December 2025 (49.4 in November 2025; 45.9 in December 2024). A reading below 50 typically corresponds to cautious expansion plans, which in the labour market manifests as: (1) prioritising the closure of “bottlenecks” (engineering, blue-collar, logistics, technical roles); (2) reallocating functions within companies; (3) higher requirements for employees’ competences and versatility.

Financial conditions at the end of 2025 remained restrictive for rapid business scaling. On 11 December 2025, the NBU kept the key policy rate at 15.5%. For enterprises (especially SMEs), this meant more expensive capital and stricter project payback criteria. As a result, some employers would focus on maintaining operational resilience and productivity (including process automation) rather than rapidly increasing headcount.

External financial support and the NBU’s policy strengthened macro-financial resilience. According to the NBU, Ukraine’s international reserves as of 1 January 2026 amounted to \$57.3 billion, and in 2025 they increased by more than 30%. For businesses, this improves the predictability of the foreign-exchange and financial environment and reduces the risk of sharp “shocks” in the cost of imported components, fuel, and equipment.

In 2025, an additional stimulus for the economy was the policy to develop Ukrainian producers. According to the Ministry of Economy, the “Made in Ukraine” policy programmes in 2025 contributed 0.95 percentage points to GDP growth. This contribution is important precisely from the employment perspective, as support for production and processing typically creates demand not only for the “core” production occupations, but also for adjacent roles: technical maintenance, logistics, quality control, procurement, and energy services.

Administrative data from the State Employment Service show both high employer demand and significant flows of jobseekers. In 2025, more than 640 thousand people used the employment service’s services, and more than 315 thousand people were placed in jobs; by the end of 2025, there were 192 thousand job offers on the Unified Vacancy Portal, and 49 thousand vacancies in the SES database. The combination of “many vacancies” and “a significant number of people using employment services” points to structural gaps: mismatches in skills and experience, regional imbalances, differing expectations regarding pay and working conditions, mobility constraints, and security factors.

In an analytical paper on the labour market during the war, the NBU notes that the labour force participation rate declined by about nine percentage points between 2022 and 2025. During the war, regional and demographic disparities became pronounced: in Kyiv, the unemployment rate remained lower, the east of the country was hit hardest, and the urban-rural gap narrowed after 2023. The male labour force participation rate is about 17.9 percentage points higher than the female rate and varies significantly throughout the full-scale war. The gender gap narrowed over time, but as of 2025 it remains substantial. Education proved to be a decisive factor in maintaining employment: university and vocational training significantly increased both the probability of labour force participation and the probability of employment. These findings are also confirmed by our survey.

The World Bank’s “Listening to Ukraine: Update Fall 2025” emphasises that despite high labour demand, labour market frictions and mismatches persist, and vulnerable groups face greater barriers. This is important for interpreting why some vacancies remain unfilled even when there are people looking for work. Despite high labour demand in certain sectors, low labour force participation among low-skilled and vulnerable groups indicates that mismatches in the

labour market are increasing in an economy being transformed by current circumstances. These mismatches need to be addressed through employer demand-driven retraining programmes, as well as systems that generate and operationalise labour market analytics to connect workers with employment opportunities.



1.2. MICROECONOMIC DRIVERS OF CHANGE

In 2025, most enterprises surveyed operated under stable production volumes: 65.0% reported no change, while 13.4% of respondents declared growth, mostly on a moderate scale. At the same time, 21.5% of enterprises reported a decline in production. Expectations for 2026 are cautiously optimistic: the share of enterprises forecasting growth increases to 21.7%, while the expected contraction decreases to 11.1% (Fig. 1).

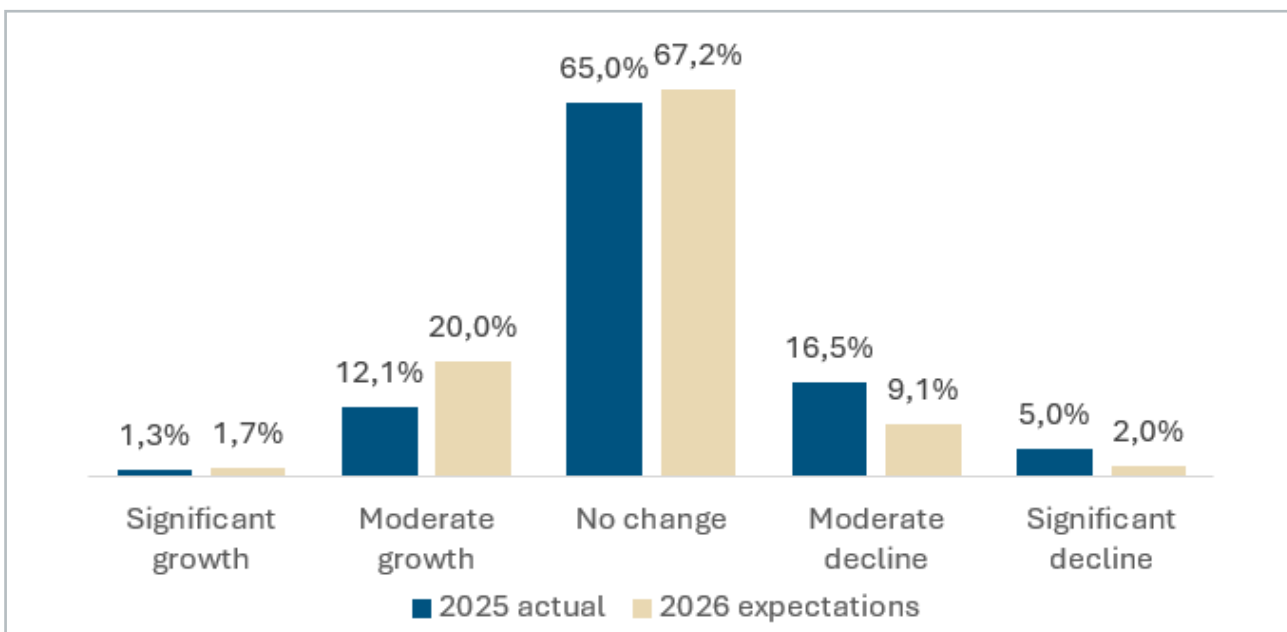


Fig. 1 Change in production volumes, % of enterprises

The regional breakdown shows pronounced unevenness. In Kyiv City, 74.4% of enterprises reported no change in 2025, while in frontline regions decline dominates: in Donetsk oblast, 33.9% of enterprises reported a significant decline in production and a further 26.2% reported a moderate decline; in Kherson oblast, the figures were 20.9% and 21.6%, respectively (Fig. 2). Even in relatively stable regions, the share of enterprises reporting a decline exceeds 30%.

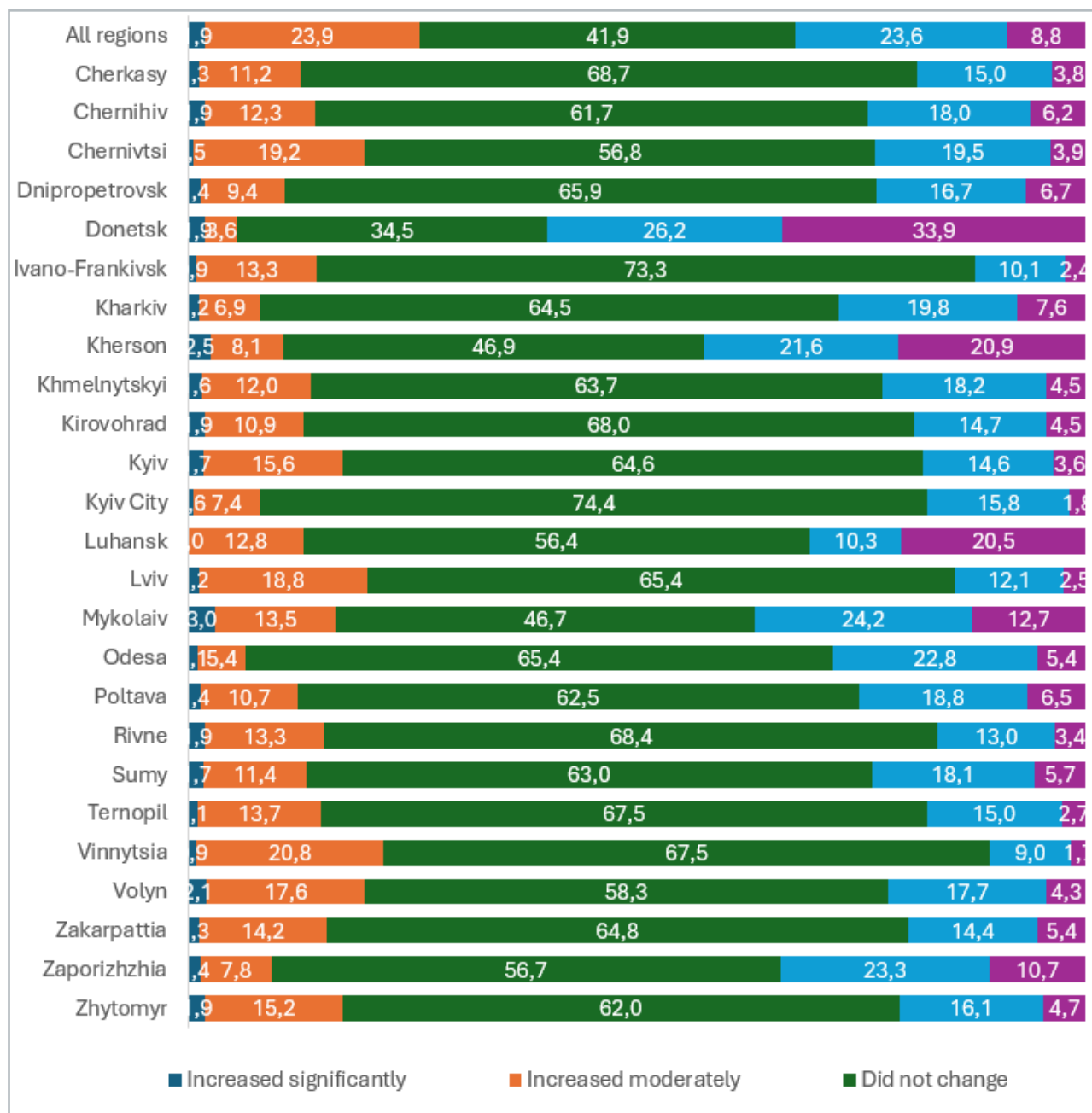


Fig. 2 Change in production volumes by region, % of enterprises

The sectoral breakdown confirms the predominance of a maintenance mode: in education, 82.5% of enterprises reported no change; in public administration – 73.4%; in energy – 73.5%. At the same time, in the extractive industry only 48.2% of enterprises maintained volumes, while 37.0% reported a decline, including 15.9% reporting a significant decline (Fig. 3).

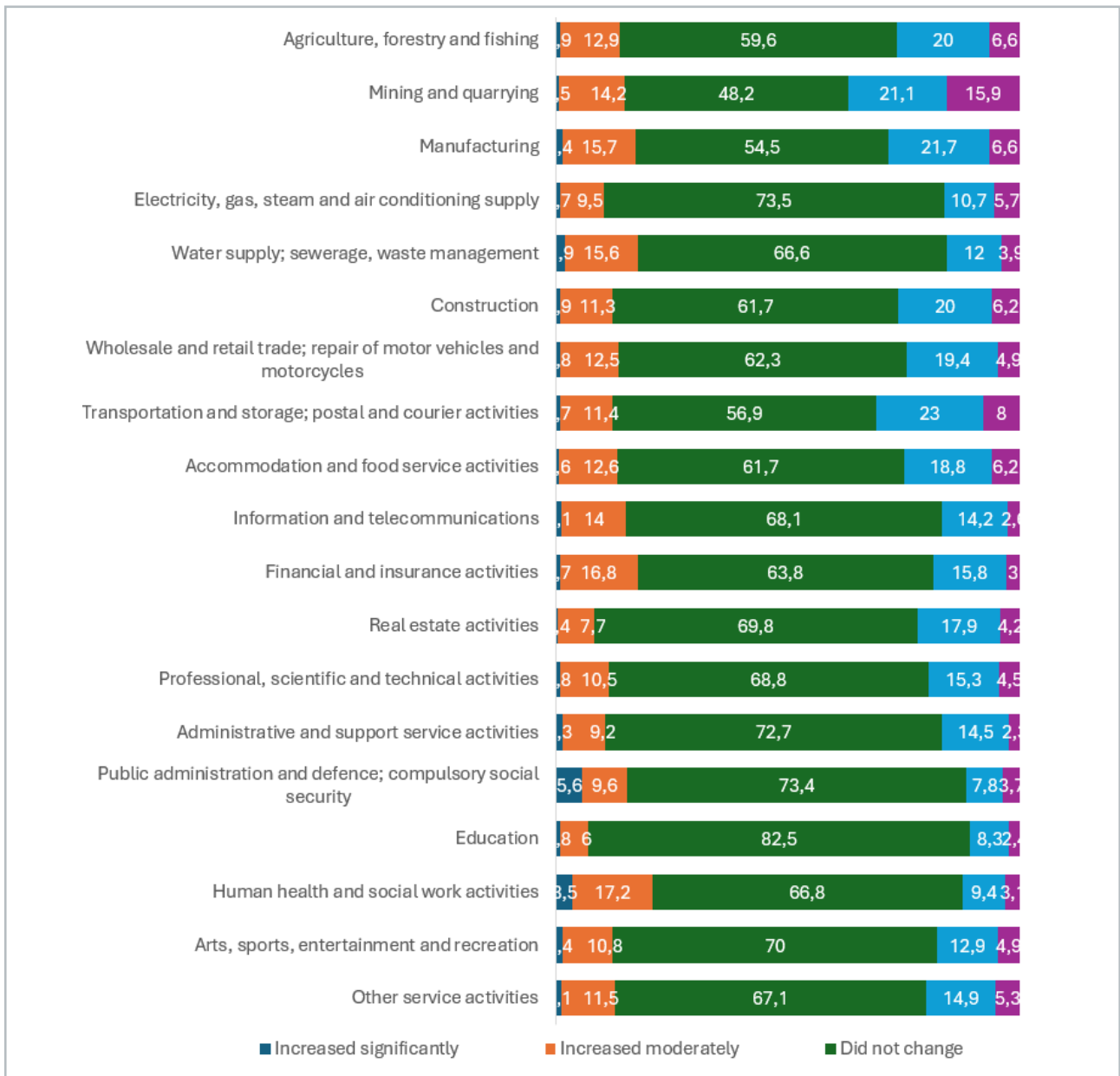


Fig. 3 Change in production volumes by industry, % of enterprises

Production growth in 2025 is largely explained by increased demand (45.3%), while 19.7% cited expansion of sales markets and 11.4% cited modernisation (Fig. 4). The structure of factors differs significantly by enterprise size. Large enterprises more often than others associate growth with modernisation (44.2%) and improved employee qualifications (37.8%), while small enterprises emphasise increased demand (43.8%) and expansion of sales markets (16.0%) (Fig. 5).

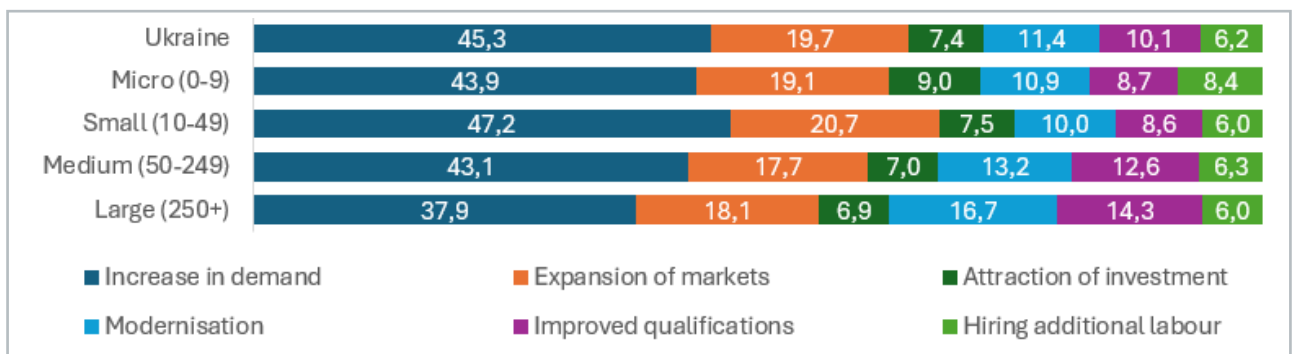


Fig. 4 Reasons for the increase in production volumes by enterprise size, %

By contrast, the reasons for contraction are mostly external: hostilities (26.4%), decreased demand (24.8%), and rising production costs (14.9%) (Fig. 5)

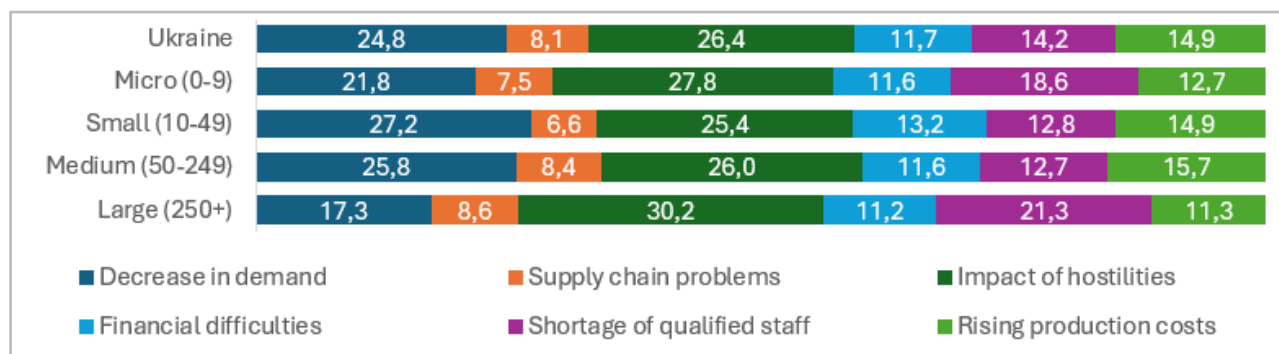


Fig. 5. Reasons for the decrease in production volumes by enterprise size, %

A separate factor is physical damage to enterprises: in 2025, 8.2% of respondents experienced such damage, and among large enterprises this figure was 26.8%, which is significantly higher than the level for small and micro enterprises (about 6%) (Fig. 6).

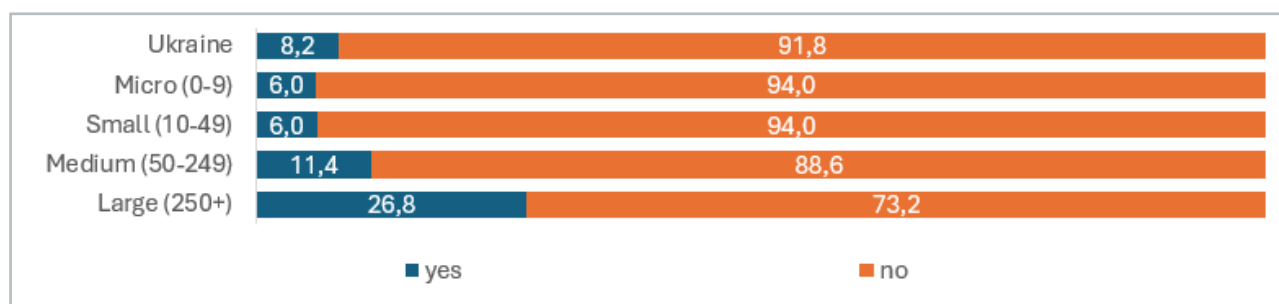


Fig. 6. Suffered damage from the Russian Federation, by enterprises size, %

Expectations for 2026 are also uneven. The most optimistic are large enterprises: significant and moderate growth is forecast by 4.6% and 28.3% of enterprises, respectively. Small and micro enterprises are the most pessimistic: 4.5% of micro and 2% of small enterprises expect a significant decline, while a further 10% of micro and 9.8% of small enterprises expect a moderate decrease in production volumes. Among regions, the best forecasts are reported by enterprises in Volyn oblast (3.0% forecast significant growth and 32.2% forecast moderate growth), Kyiv oblast (2.0% and 30.4%, respectively), and Ivano-Frankivsk oblast (2.8% and 27.4%, respectively). The worst expectations, besides Donetsk oblast, are in Odesa oblast (2.3% significant decline, 15.2% moderate decline), Kharkiv oblast (2.4% and 13.6%, respectively), as well as Zaporizhzhia oblast (6.3% and 11.5%, respectively). By sector, the most optimistic forecasts are in healthcare (3.9% significant growth and 24.5% moderate growth), manufacturing (2.3% and 24.7%, respectively), as well as the extractive industry and financial activities, with almost the same figures (1% significant growth and 23% moderate growth).

1.3. DYNAMICS OF THE WORKFORCE SIZE

According to the survey results, during the first ten months of 2025 the reduction in staff numbers amounted to 2.8%, which is more than twice the 2024 figure (1.1%) (Fig. 7). At the same time, employers expect employment levels to recover to those of early 2025 by the end of the year. The dynamics are simultaneously influenced by security conditions, migration/mobilisation, and the reallocation of demand across sectors; therefore, this indicator should be interpreted as structural rather than short-term.



Fig. 7. Change in staff numbers: a) percent, b) thousand persons

At the same time, the share of enterprises reporting staff reductions declined to 21% in 2025 (Fig. 8), compared to 30% in 2024. This indicates a change in the nature of layoffs: they became less widespread but more substantial at the level of individual enterprises. This concentration of reductions is confirmed by the structure of changes by enterprise size.

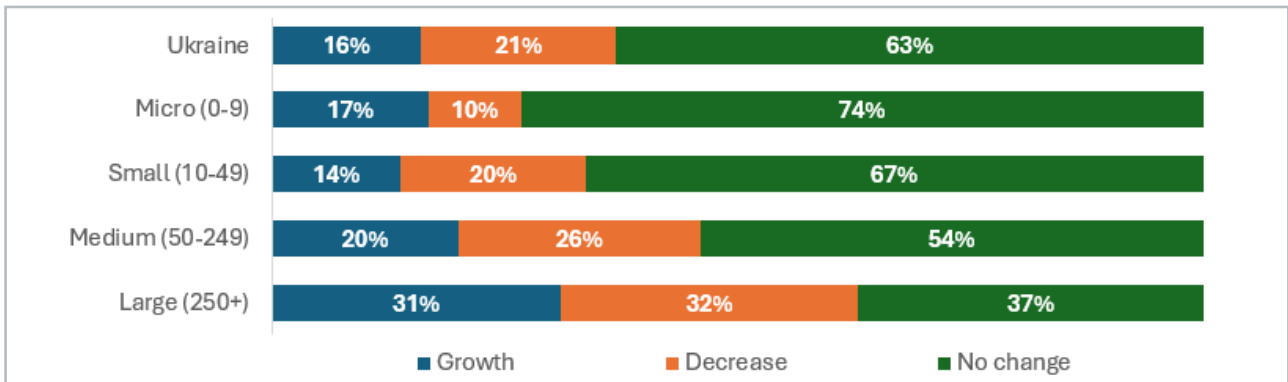


Fig. 8. Changes in the number of employees in 2025, by enterprise size, %

The largest losses were recorded among large enterprises, where 32% of respondents reported staff reductions (Fig. 8), while the total number of laid-off workers exceeded 62 thousand persons (Fig. 9). By comparison, in 2024 large enterprises much more often demonstrated employment growth (43%), while the main reductions were concentrated among micro enterprises. In 2025, large enterprises are characterised by a high polarisation of dynamics: almost equal shares report both growth (31%) and reductions (32%) in staff numbers, which may indicate targeted but deep restructuring. Most likely, this is not about gradual workforce “adjustment” typical of small enterprises, but about decisions of a systemic nature: closure or mothballing of individual units, winding down certain activities, optimisation of production chains, or adaptation to the constraints of the wartime economy.

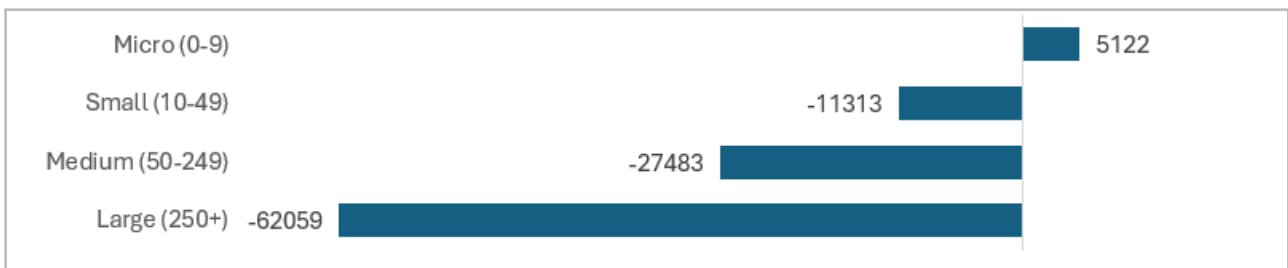


Fig. 9. Change in the number of employees by enterprise size, persons

At the same time, the majority of enterprises in 2025 did not experience changes in staff numbers (63% nationwide). The highest level of stability is observed among micro enterprises (74%). In absolute terms, only micro enterprises recorded an overall increase in employment (+5.1 thousand persons) (Fig. 9).

In the structure of total employment growth in 2025 (Fig. 10), almost half (49.3%) is accounted for by large enterprises, exceeding the 2024 figure (43.1%). At the same time, large employers also generated the main share of reductions: 55.3% compared to 35.8% in 2024, when layoffs were predominantly concentrated in the small and medium business segment (together over 52%). Thus, in 2025 large enterprises acted as a key driver of both employment growth and employment decline. This confirms the earlier thesis that large companies more often made “package” decisions (unit optimisation, line shutdowns, relocation), meaning that reductions occurred less frequently but on a larger scale.

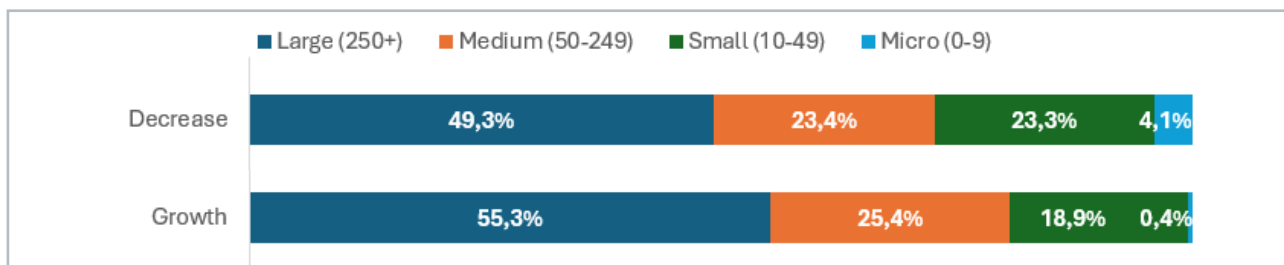


Fig. 10. Distribution of the total change in the number of employees by enterprise size, %

As in the previous year, the largest employment reductions in 2025 (Fig. 11) were observed in transport (–2.1 thousand persons). Education (–9.2 thousand) and the financial sector (–18.3 thousand) ranked second and third, whereas in 2024 the largest declines were recorded in mining (–16.0 thousand) and agriculture (–6.7 thousand). At the same time, employment growth was recorded in mining (+3.0 thousand), administrative and support service activities (+2.1 thousand), and agriculture (+1.4 thousand), which, as noted, was among the three sectors with the largest workforce losses in 2024. Among large enterprises, the strongest growth was observed in mining, administrative and support service activities, and manufacturing.

Regional employment growth in 2025 was recorded in only seven regions (compared to eight in 2024) and did not exceed 1.3%. The leaders were Zhytomyr, Lviv, and Volyn oblasts (Fig. 11). The smaller scale of growth compared to the previous year may indicate a gradual “saturation” of western regions and a slowdown in internal migration. Slight growth was also observed in Ternopil, Kirovohrad, Chernihiv, and Zakarpattia oblasts. The largest employment losses were recorded in Kharkiv oblast, Kyiv City, and Donetsk oblast.

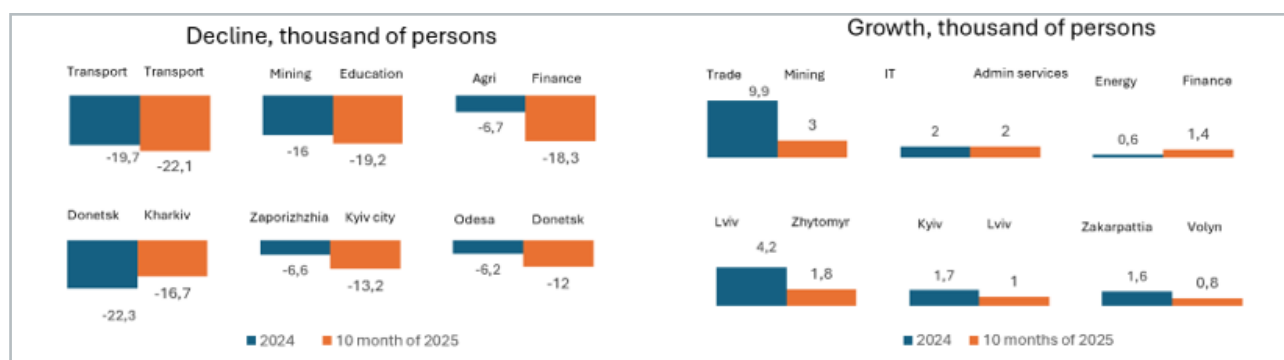


Fig. 11. Top three leaders in staff reductions and growth by sector and region, thousand persons

As in the previous year, staff reductions in 2025 are largely associated with the limited capacity of enterprises to fill open vacancies. The presence of vacancies was reported by 27.3% of surveyed enterprises, corresponding to more than 158 thousand open jobs (compared to 23.8% and 116 thousand in 2024). More than half of these vacancies (57.5%) were reported by enterprises that either reduced staff or had no changes in headcount, indicating a structural rather than cyclical nature of labour shortages. A more detailed analysis of vacancies available

at the time of the survey is presented in Section 2.1. It should also be noted that changes in staff numbers led to structural shifts of enterprises between size groups. Overall, 1.6% of enterprises moved to a larger size group, while 4.8% moved to a smaller one.

Thus, in 2025 employment contraction became less dispersed but more intensive, increasing its macroeconomic impact. The concentration of reductions among large employers implies job losses with higher average wages, a higher degree of formal employment, and a stronger multiplier effect on related industries and regional labour markets. It also indicates that optimisation decisions are made in packages (by units or lines of activity) rather than on a case-by-case basis, as is more typical for small businesses. In a wartime economy, this is often linked to the restructuring of production chains, energy and logistics constraints, as well as growing uncertainty for investment and planning.

1.4. EMPLOYMENT STRUCTURE

1.4.1. Occupational structure

According to the survey data, the largest headcounts are observed at enterprises in manufacturing (776 thousand persons), healthcare (634 thousand), and education (523 thousand) (Fig. 12).

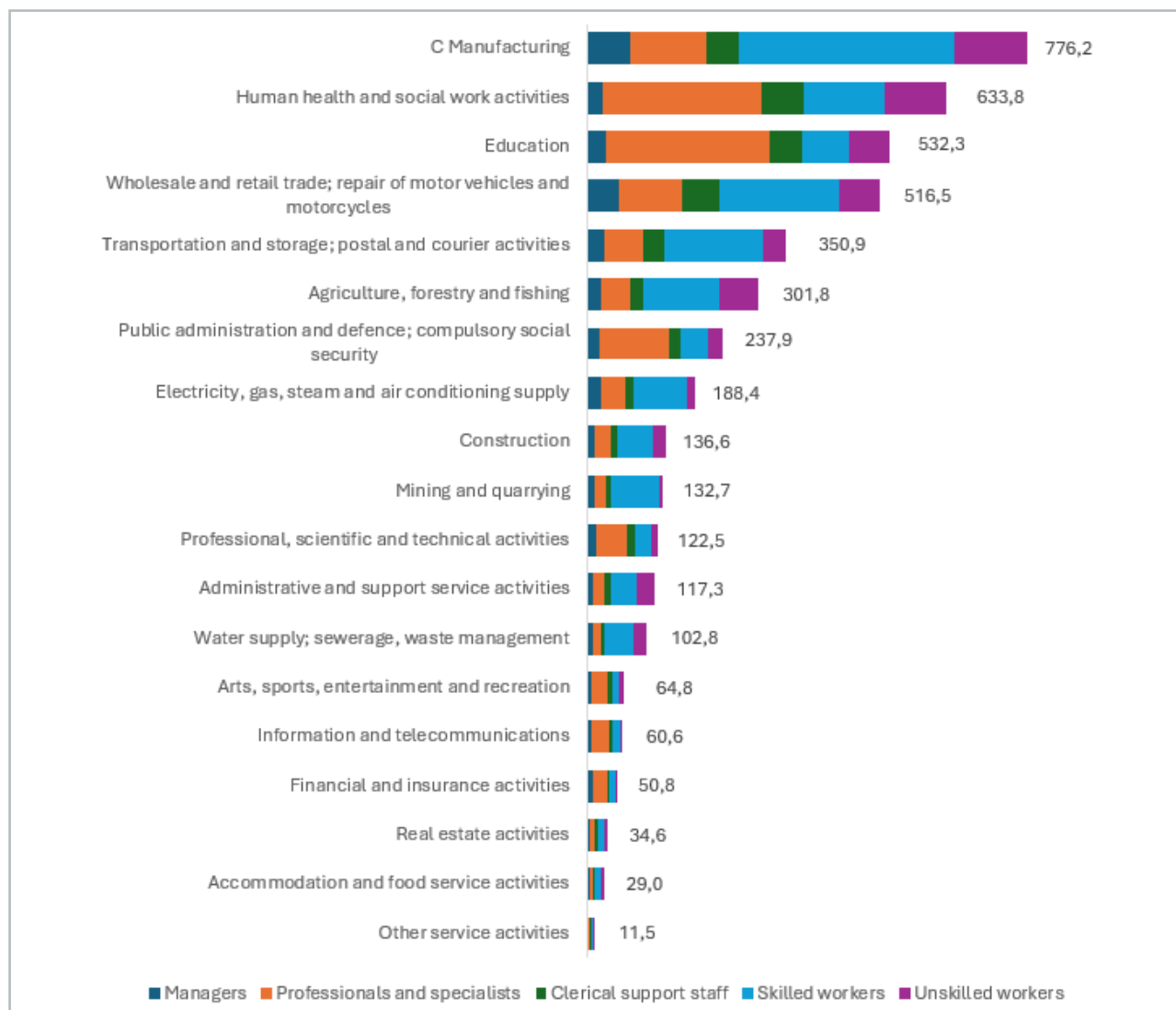


Fig. 12. Number of employees by sector, thousand persons

A comparison of the occupational structure of employment¹ in 2024 and 2025 indicates a noticeable reallocation of labour towards higher-skilled categories of workers. In 2024, skilled workers were the clearly dominant group, accounting for 42.9% of total employment (Fig. 13). In 2025, they remain the largest category, but their share decreased to 36.5% - the largest relative decline among all occupational groups.

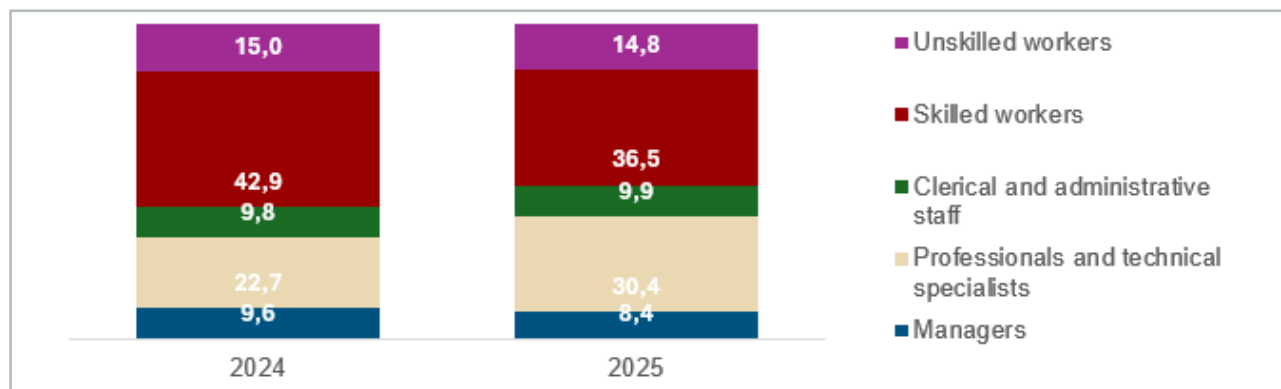


Fig. 13. Categories of employees, %

At the same time, the share of professionals and specialists increased from 22.7% to 30.4%. This growth may reflect a structural reorientation of the labour market under wartime conditions and suggests that enterprises are focusing on maintaining critical processes, improving efficiency, and adapting business models rather than expanding production extensively. It also reflects the mobilisation of men and difficulties in filling vacancies in blue-collar occupations. The share of managers decreased from 9.6% to 8.4%, which may indicate optimisation of management levels and simplification of organisational structures. The shares of clerical and administrative staff (9.8% in 2024 and 9.9% in 2025) and unskilled workers (15.0% in 2024 and 14.8% in 2025) remained virtually unchanged, pointing to relative stability in these segments even amid an overall decline in employment.

The 2025 data confirm that skilled workers continue to be the core workforce category in production and infrastructure sectors (Fig. 14). Their largest headcounts are concentrated in manufacturing, trade, transport, healthcare, and agriculture. In percentage terms, skilled workers account for more than 64% in mining and quarrying, and around half in energy, transport, manufacturing, water supply, and construction (Fig. 8). This is consistent with 2024 data, when these sectors also showed the highest shares of skilled workers in the employment structure. At the same time, there are sectors where professionals and specialists dominate: their share is around 50%. These include education, public administration, financial activities, and information and telecommunications.

In the regional dimension in 2025, the largest numbers of employees are concentrated in Dnipropetrovsk oblast, Kyiv City, Lviv oblast, Kyiv oblast, and Odesa oblast. In percentage terms, the highest shares of skilled workers are observed in Dnipropetrovsk (44.8%), Poltava (40.5%), and Ivano-Frankivsk (39.0%) oblasts (Fig. 15). Compared to 2024, only Dnipropetrovsk oblast did not change its employment structure. Last year, the highest shares of skilled workers were also observed in Zhytomyr (48.3%) and Kharkiv (45.9%) oblasts. Professionals and specialists are most strongly represented in Luhansk (65.1%), Kherson (43.7%), and Chernivtsi (36.7%) oblasts; in 2024, the leaders in this category included Ivano-Frankivsk (29.2%), Luhansk (27.7%), and Rivne (27.6%). This is driven by the structure of economic activity.

¹ Respondents independently determined the classification of employees into one of the categories. The categories correspond to the sections of the Classifier of Occupations.



Fig. 14. Share of employees by sector, %

Changes in the regional employment structure in 2025 are driven by a combination of sectoral specialisation of regions, wartime factors, and demographic shifts. The stability of the employment structure in Dnipropetrovsk oblast is explained by the preservation of the industrial and infrastructure core of the economy, which generates steady demand for skilled workers, while in Poltava and Ivano-Frankivsk oblasts the high share of this group is linked to a combination of industrial and agricultural specialisation. By contrast, in regions that have been significantly affected by hostilities, high percentage shares of professionals and specialists result from economic activity being reduced to a limited set of functions (public sector, social services, healthcare, education), which automatically increases the share of professionals in the employment structure. Compared to 2024, the change in the composition of leading regions reflects the waning of the effect of business and labour relocation, as well as the adaptation

of regional labour markets to the wartime economy, where percentage structures increasingly reflect a shrinking employment base rather than its expansion.

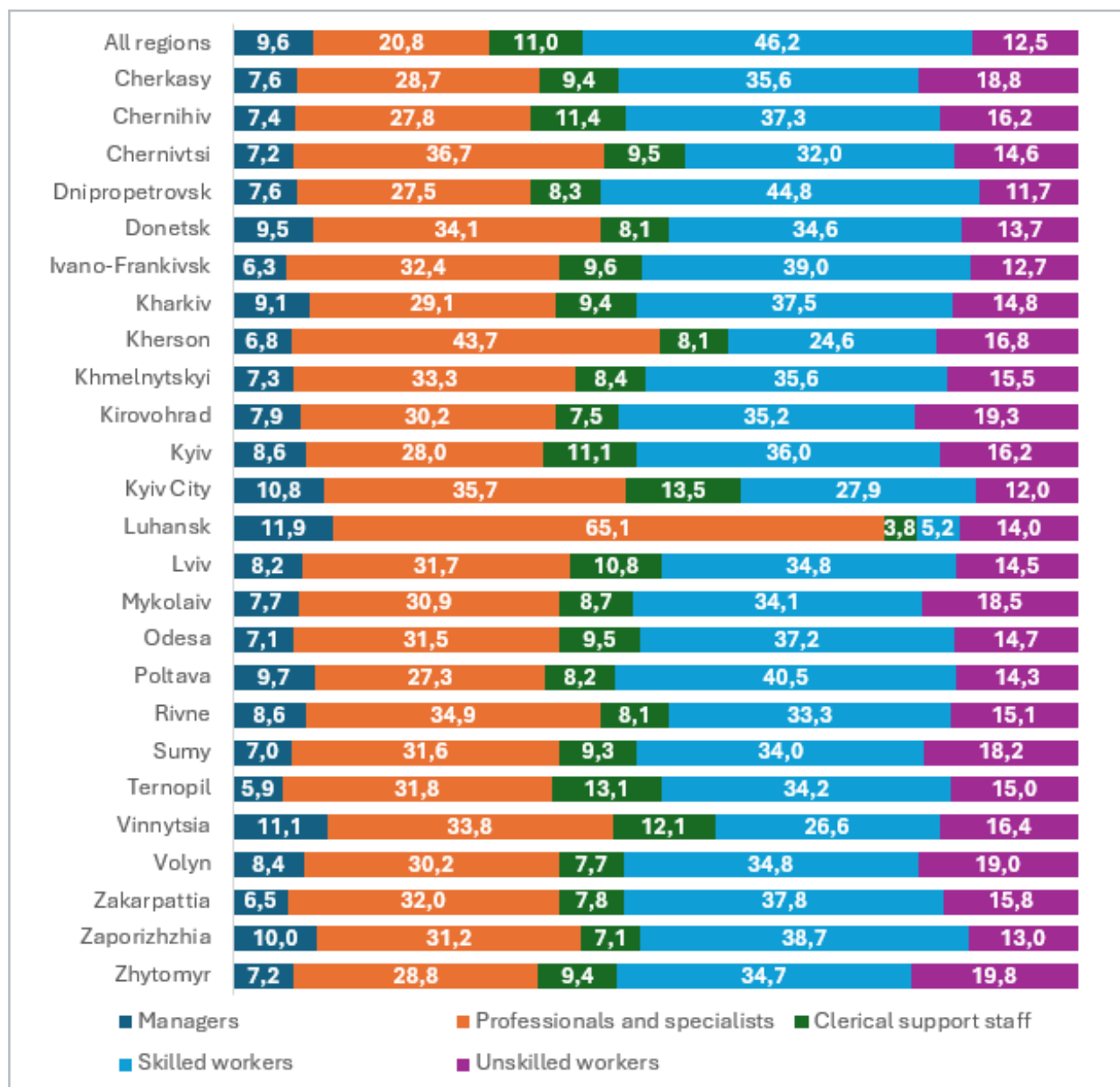


Fig. 15. Occupational structure of employment by region, %

The employment structure by enterprise size in 2025 confirms that the main mass of skilled workers is concentrated in large and medium enterprises that provide the production and infrastructure backbone of the economy. These enterprises account for both the largest volume of employment and the main job losses, which is consistent with restructuring and optimisation processes.

Micro enterprises, as in 2024, are characterised by a relatively high share of managers and executives, which is explained by the combination of managerial and operational functions within a single position. At the same time, their contribution to overall employment of skilled workers remains limited.

A comparison of 2024 and 2025 indicates a structural transformation of Ukraine’s labour market. On the one hand, skilled workers remain the key employed group, yet they experienced

the largest relative decline. On the other hand, the rapid increase in the share of professionals and specialists points to a reorientation of the economy towards knowledge-intensive, managerial, and socially significant activities.

Such dynamics create risks of a structural shortage of skilled blue-collar labour in the medium term and underline the need to adjust policies on vocational education, retraining, and support for industrial employment under wartime conditions.

1.4.2. Age structure

A comparison of the age structure of employment in 2024 and 2025 indicates a decrease in the share of youth in most sectors of the economy, alongside an overall increase in the role of older age groups. The share of youth under 25 in the overall employment structure declined from 6.4% in 2024 to 4.7% in 2025, while the share of workers aged 60+ increased from 13.2% to 14.1%. This points to a narrowing inflow of young workers and a growing role of older age groups in sustaining employment. Likely drivers include migration for education, delayed entry into the labour market, wartime constraints, and changes in the attractiveness of sectors for first employment. In addition, the study was conducted before it was possible to assess the impact of allowing young men under 22 to travel abroad, so a further decrease in the share of youth can be expected.



Whereas in 2024 certain sectors, primarily accommodation and food service activities, trade, financial activities, and ICT, had a relatively high share of youth (under 25), in 2025 the situation changed dramatically (Table 1). The most illustrative example is accommodation and food service activities, where the share of youth declined from 25.8% to 1.1%, indicating a mass exit from the sector.

Economic activity	Up to 25		From 25 to 60		60+	
	2024	2025	2024	2025	2024	2025
Agriculture, forestry and fishing	4,9	3,6	82,6	84,4	12,5	12,0
Mining and quarrying	4,6	1,7	87,4	86,9	8,0	9,3
Manufacturing	5,9	12,6	82,8	83,4	11,3	11,7
Electricity, gas, steam and air conditioning supply	4,3	2,0	78,9	81,3	16,8	15,5
Water supply; sewerage, waste management	2,0	0,7	71,8	72,3	26,2	25,8
Construction	5,4	1,7	83,1	84,1	11,5	12,1
Wholesale and retail trade; repair of motor vehicles and motorcycles	11,7	14,2	81,0	83,4	7,3	8,3
Transportation and storage; postal and courier activities	4,6	4,2	84,6	83,7	10,7	12,7
Accommodation and food service activities	25,8	1,1	66,3	78,0	7,9	10,2
Information and telecommunications	8,9	1,5	86,1	86,0	5,1	6,6
Financial and insurance activities	10,2	1,5	84,2	86,7	5,6	4,7
Real estate activities	6,1	0,4	76,6	78,1	17,3	18,0
Professional, scientific and technical activities	5,3	1,7	80,8	78,7	13,8	17,2
Administrative and support service activities	5,1	1,3	77,2	77,1	17,7	19,5
Public administration and defence; compulsory social security	6,5	3,2	78,7	83,2	14,8	12,8
Education	4,9	6,5	76,4	76,6	18,7	19,7
Human health and social work activities	5,7	8,9	77,5	78,2	16,8	17,6
Arts, sports, entertainment and recreation	7,4	1,4	72,9	73,0	19,6	20,4
Other service activities	5,5	0,2	77,4	79,3	17,2	15,2

Table 1. Age structure of employees by type of economic activity, %

At the same time, in 2025 new sectoral leaders emerged in terms of the share of youth, in particular manufacturing (12.6%), trade (14.2%), and healthcare (8.9%), which was not characteristic of 2024. This may point to a partial shift in first-employment pathways towards more stable or formalised sectors, or it may be linked to mobilisation deferments for youth under 25. However, in most sectors, in particular construction, energy, mining and quarrying, administrative services, and transport, the share of youth in 2025 fell to critically low levels (1–2%), increasing risks to workforce reproduction.

The most persistent trend in 2025 is the rising share of workers aged 60+, especially in sectors with low attractiveness for youth. The most pronounced ageing is observed in water supply and waste management (25.8%), arts (20.4%), education (19.7%), and administrative services (19.5%). Compared to 2024, these sectors are increasingly reliant on older cohorts, indicating not only demographic pressure but also weak mechanisms for workforce renewal.

Overall, the key difference between 2025 and 2024 lies less in changes to the sectoral hierarchy and more in the intensification of age-structure polarisation: some sectors retain limited “islands” of youth employment, while most shift rapidly towards workforce ageing. This points to a systemic problem and creates long-term risks for physically demanding sectors, as well as for sectors that ensure continuity of basic social and economic services (energy, transport, water supply, housing and communal services, and social services).

1.4.3. Gender structure of employment

In 2025, the gender structure of employment remains skewed towards men: men account for 55.4% of those employed, while women account for 44.6%. This contrasts with the pre-war demographic structure, where women constituted the majority of the population (54%), but is consistent with the higher male labour force participation rate, indicating a gender gap specifically in formal employment.

Female employment shows pronounced sectoral concentration (Fig. 16). The largest numbers of employed women are concentrated in healthcare and social work (398 thousand), education (319 thousand), manufacturing (282 thousand), and trade (262 thousand). In these sectors, women account for a substantial share of the workforce (Fig. 17), in particular 62.8% in healthcare, 60.5% in financial activities, 59.9% in education, and 59.1% in public administration. At the same time, women account for only 16.7% of employment in construction, 23.6% in mining and quarrying, and 27.7% in agriculture, highlighting the persistence of traditional sectoral segregation.

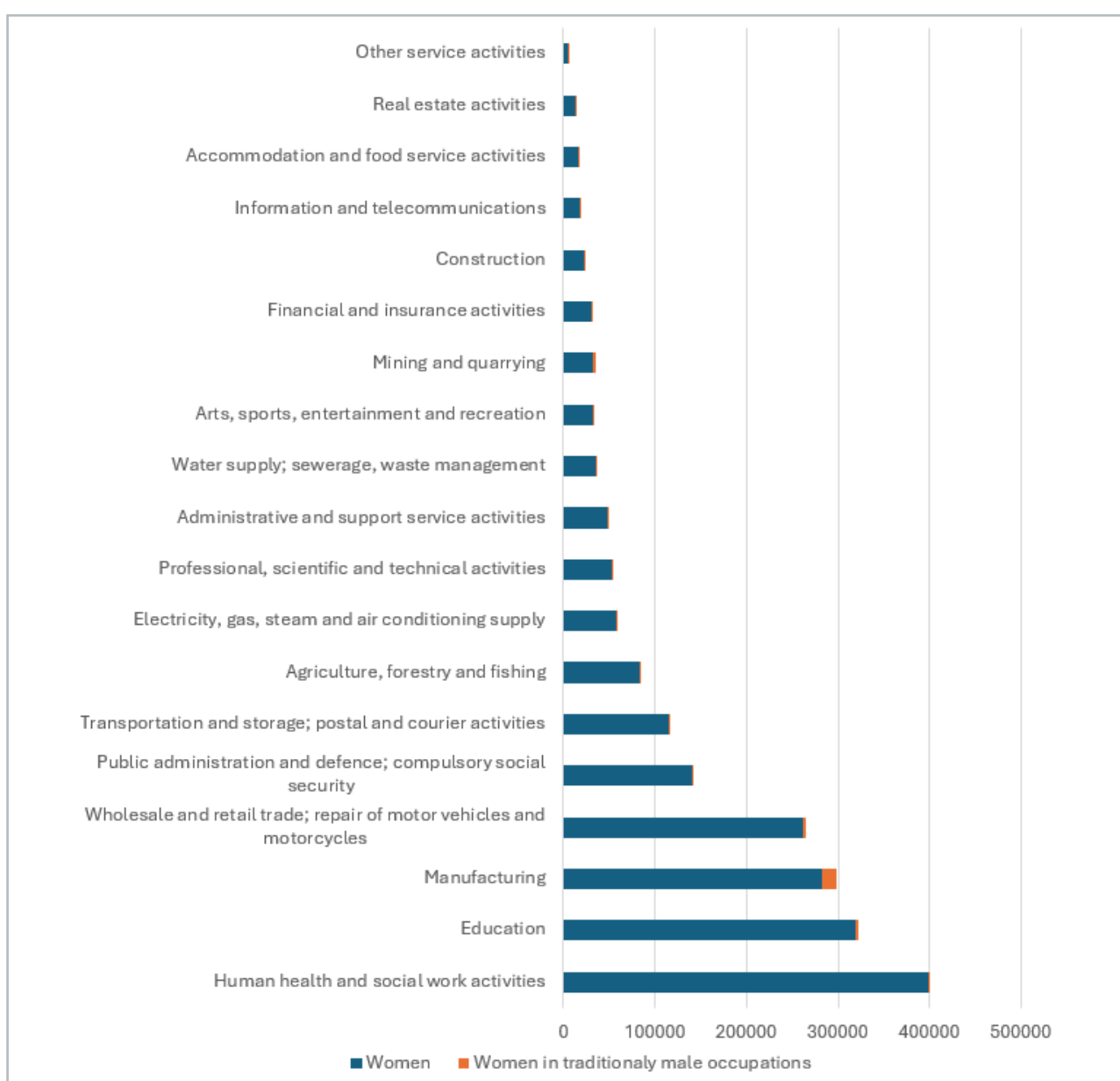


Fig. 16. Number of employed women by sector, persons

The concentration of female employment in regulated and social sectors is usually associated with greater formalisation of working conditions and lower entry barriers compared to more physically demanding or hazardous types of work.

The vast majority of women continue to work in traditionally “female” occupations: 98.1% compared to 1.9% in traditionally “male” positions. Even in sectors with large numbers of women, transitions into non-traditional occupational roles remain limited: for example, in manufacturing, out of more than 280 thousand women only about 15.7 thousand are employed in such positions; in transport, about 3.1 thousand; in mining and quarrying, 3.3 thousand. At the same time, manufacturing is the leading sector in engaging women in traditionally “male” occupations.

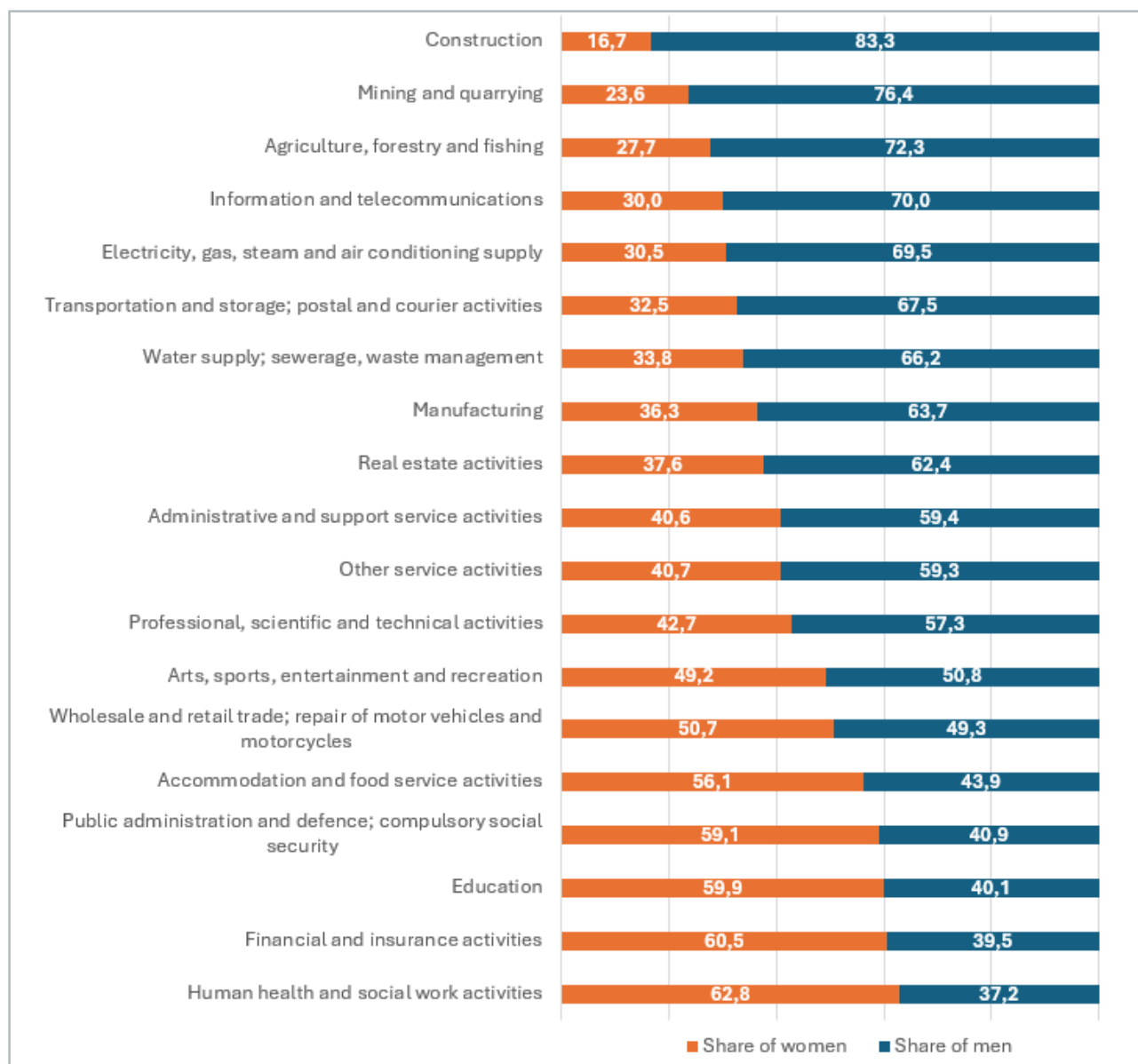


Fig. 17. Gender composition of employed persons, %

A higher share of women in large and medium enterprises (46.2% and 45.7%, respectively) is linked to the employment structure of these segments, which include higher concentrations of education, healthcare, finance, and large service units. Large enterprises more often offer formalised working conditions and stable roles, which supports the retention and growth of female employment. In 2025, the share of women increased in 39.2% of large enterprises, compared to 17.4% of small and 14.2% of micro enterprises.

The sectoral distribution of enterprises where the share of women increased is also uneven. The highest shares of such changes were recorded in financial and insurance activities (29.6%), accommodation and food service activities (27.0%), healthcare (26.2%), and public administration (25.8%). By contrast, in construction (10.2%) and transport (11.5%), growth in women’s participation remains limited, indicating slow structural change in traditionally “male” sectors.

Overall, the data indicate that in 2025 the expansion of women’s participation in employment occurred mainly through increased presence in socially oriented and regulated sectors and in large enterprises, while sectoral and occupational gender segregation persisted and remained a key constraint to balanced labour market recovery.

1.4.4. Specific groups of workers

In 2025, the employment structure shows a moderate but consistent increase in the shares of several groups of workers (Fig. 18). The share of persons with disabilities increased from 6.1% in 2024 to 6.5% in 2025, the share of internally displaced persons from 2.6% to 3.2%, and the share of workers aged 60+ from 13.2% to 14.1%. Against this backdrop, the share of combatants remained virtually unchanged (1.1% in 2024 compared to 1.0% in 2025), while the share of foreigners remained stably low at 0.06%, indicating a limited role of external labour migration in compensating for labour shortages, at least in formal employment. The low share of combatants may reflect underdeveloped mechanisms for their employment and workplace adaptation (retraining, support, flexible working conditions), as well as the fact that many potential candidates are either still in service or face barriers to returning to civilian employment (health conditions, skills mismatches with employers’ needs, stigma). At the same time, the increase in the shares of IDPs and persons with disabilities is more often explained by a combination of two factors: more active engagement of these groups in the labour market and the effect of support programmes, as well as a “base effect”, where even a small absolute increase results in a noticeable percentage rise.

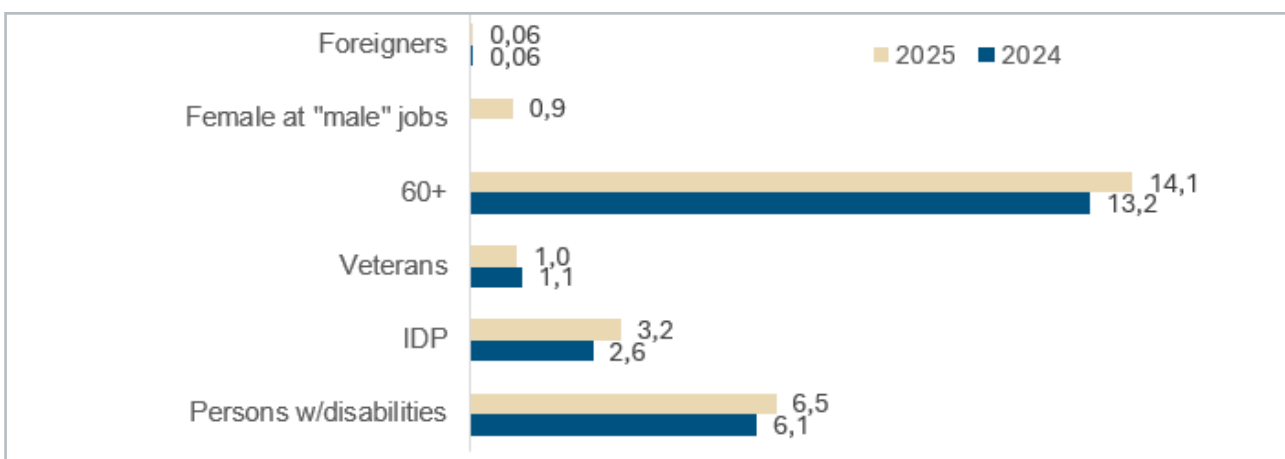


Fig. 18. Share of selected groups of employees, % of the total workforce

The sectoral distribution of specific groups is uneven. The largest numbers of persons with disabilities are concentrated in healthcare and social work (51.6 thousand), manufacturing (48.6 thousand), trade (36.0 thousand), and education (29.0 thousand). At the same time, in relative terms the highest shares of persons with disabilities are observed in other service activities (9.3%), healthcare (8.1%), agriculture (7.7%), and real estate activities (7.5%), indicating a combination of social and service employment.



The share of IDPs is highest in public administration (5.23%), trade (4.25%), and transport (4.08%), reflecting both the scale of employment in these sectors and their relative openness to employing displaced persons. By contrast, the participation of combatants is more dispersed and rarely exceeds 1–1.5% within sectors, with the exception of mining and quarrying (2.04%).

By enterprise size, most employed persons from specific groups are concentrated in large enterprises: they employ 134 thousand persons with disabilities, 73.8 thousand IDPs, and 28.5 thousand combatants. However, in percentage terms the share of persons with disabilities is higher in micro and small enterprises (7.5% and 7.3%) compared to large ones (6.1%), which may indicate greater flexibility of small-scale forms of employment. At the same time, large enterprises remain key to the large-scale inclusion of vulnerable groups in formal employment.

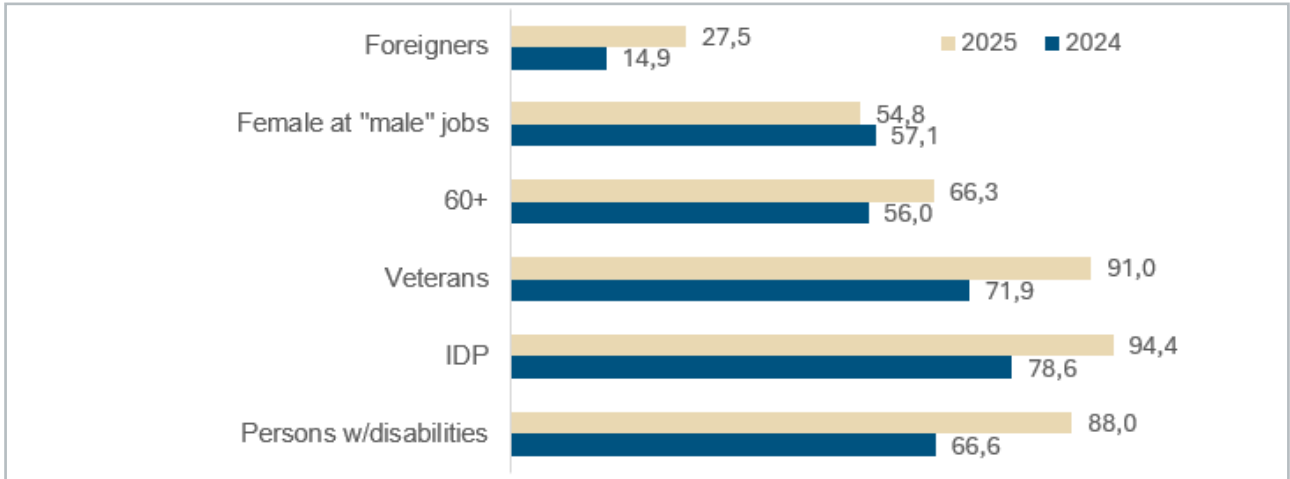


Fig. 19. Hiring readiness: % of enterprises planning to hire

Employers’ hiring plans in 2025 demonstrate a significant increase in openness to specific categories (Fig. 19). The share of enterprises willing to hire IDPs increased to 94.4% (from 78.6% in 2024), persons with disabilities to 88.0% (66.6%), and combatants to 91.0% (71.9%). At the

same time, willingness to hire women into traditionally male professions declined from 57.1% to 54.8%, which contrasts with the overall inclusiveness trend and indicates the persistence of occupational segregation. Openness to hiring foreigners remains the lowest, although even here an increase is observed, from 14.9% to 27.5%.

1.5. WORK ORGANIZATION

In 2025, the structure of work organization changed noticeably compared to 2024 (Fig. 20). The share of enterprises where work is performed in an office or directly on the company premises decreased from 93.5% to 83.0%, indicating a weakening of the dominance of a single work organization format. At the same time, remote work declined sharply, from 14.0% in 2024 to 1.6% in 2025, while home-based work decreased from 0.9% to 0.4%. Against this backdrop, flexible and hybrid formats maintained a stable presence: the share of enterprises with flexible work organization is 14.7%, which is almost the same as in the previous year (14.4%). Such a sharp drop in remote work may be driven not only by real changes, but also by differences in question wording or response selection rules between survey waves.

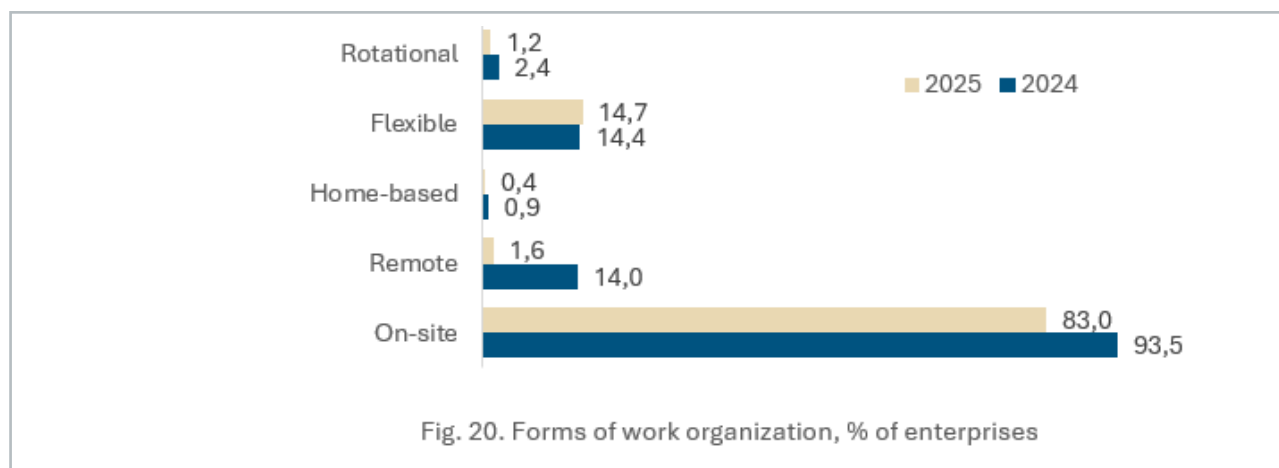


Fig. 20. Forms of work organization, % of enterprises

The breakdown by enterprise size shows that a hybrid work organization format is most common among large enterprises (24.2%), while among small and micro enterprises its share does not exceed 13.5–14.4%. At the same time, micro enterprises show a higher share of remote work (4.7%) compared to large ones (1.0%), which may be related to less formalised processes and broader combinations of functions.

The sectoral breakdown confirms substantial heterogeneity in work organization (Fig. 21). The lowest reliance on an office-only format is observed in information and telecommunications, where only 62.3% of enterprises operate exclusively from the office, and 34.2% use a hybrid format. A similar, though less pronounced, pattern is characteristic of financial activities (24.7% hybrid format) and professional, scientific and technical activities (24.8%). By contrast, in accommodation and food service activities 90.9% of enterprises operate exclusively on-site, and a hybrid format is used in only 8.3% of cases.

At the same time, in 2025 the use of part-time work increased noticeably, from 42.9% of enterprises in 2024 to 47.5% in 2025. This arrangement is most often used by large enterprises (68.7%), whereas among micro enterprises this figure is 40.0%. In sectoral terms, part-time work is most widespread in healthcare (60.6%) and education (59.9%), which may indicate adaptation

to staff shortages and uneven workloads. By region, the highest values were recorded in Luhansk (71.8%), Mykolaiv (67.8%), and Kherson (67.1%) oblasts, while the lowest were observed in Kyiv City (30.0%), Dnipropetrovsk (39.1%), and Kharkiv (39.8%) oblasts, reflecting different operating conditions in regional labour markets.

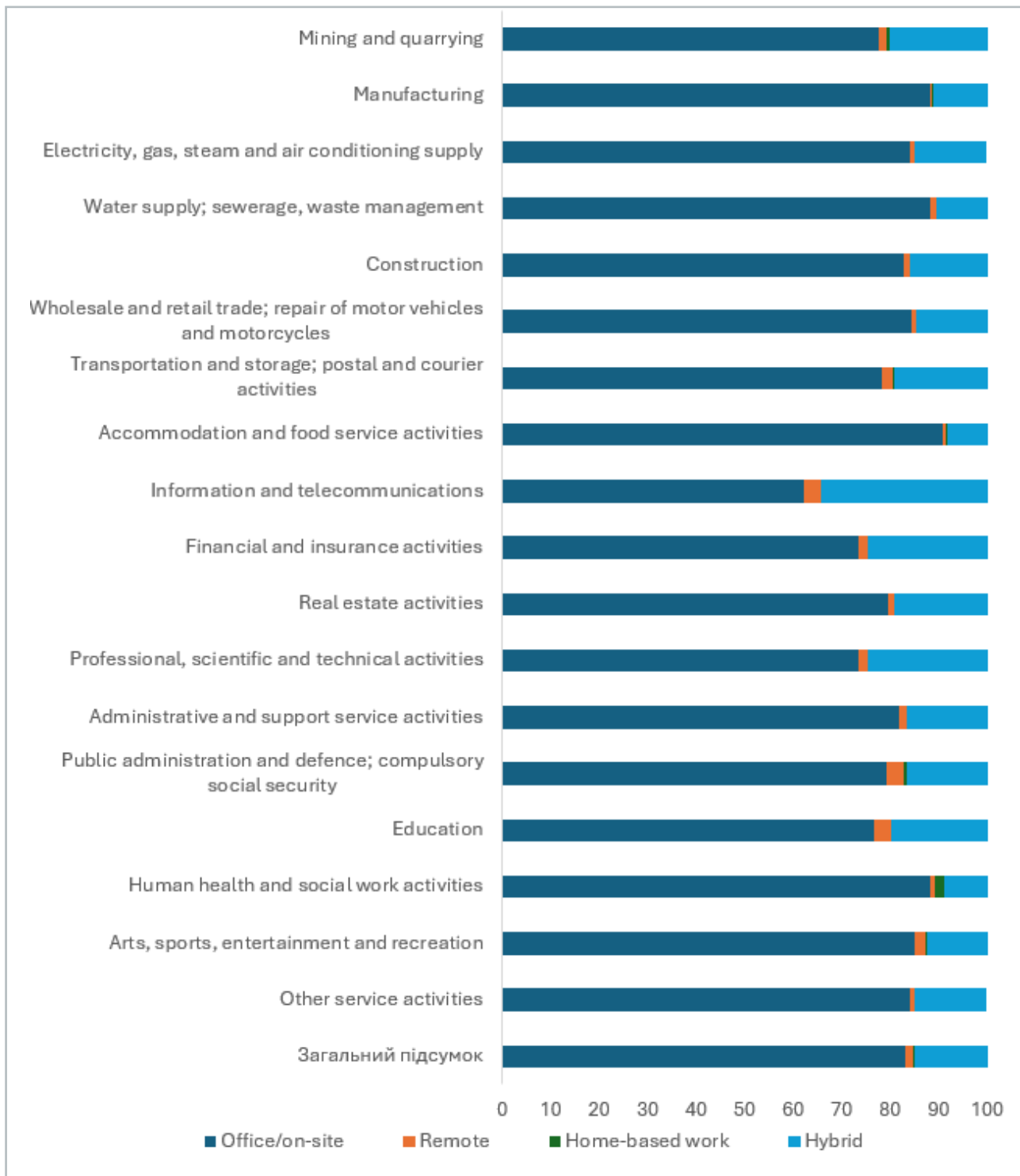


Fig. 21. Form of work organization, percentage of enterprises by sector

Employers' attitudes towards a four-day work week remain cautious and heterogeneous. Only 8.2% of enterprises are ready to introduce it without additional conditions, while another 16.9% consider such a possibility subject to further analysis. At the same time, almost one in five enterprises considers this format impractical (18.3%), and 17.9% cite technical or technological

constraints. The largest share of employers (33.7%) have no defined position, indicating the absence of established practices and limited experience in applying a shortened work week.

The regional breakdown shows that willingness to introduce a four-day week is more often reported in Vinnytsia (14.1%), Ivano-Frankivsk (12.9%), and Luhansk (12.8%) oblasts, while in Kyiv City a neutral position predominates (42.6%). By sector, the greatest openness to this format is demonstrated by public administration (14.2%), professional, scientific and technical activities (11.1%), and arts and culture (12.7%), whereas in agriculture and energy technical or technological constraints play a significant role (34.2% and 22.5%, respectively).

2. CURRENT AND PROSPECTIVE WORKFORCE NEEDS

2.1. VACANCIES AND HIRING PLANS

Of the total number of respondents, 27.2% reported having vacancies (compared to 23.8% in 2024), and 87.5% of these enterprises actually hired in 2025. The analysis of vacancies and planned hiring points to a structural labour shortage that will persist in 2026: with 158.1 thousand open vacancies in 2025, enterprises plan to hire only 116.9 thousand people, implying an uncovered need of nearly 41 thousand workers. A comparison between the percentage of enterprises that have vacancies and the distribution of vacancies by enterprise size (Fig. 22) shows that in 2025 the number of vacancies increased only among large enterprises, while the share of enterprises with vacancies increased across all size groups. This means that the average number of vacancies per enterprise decreased.

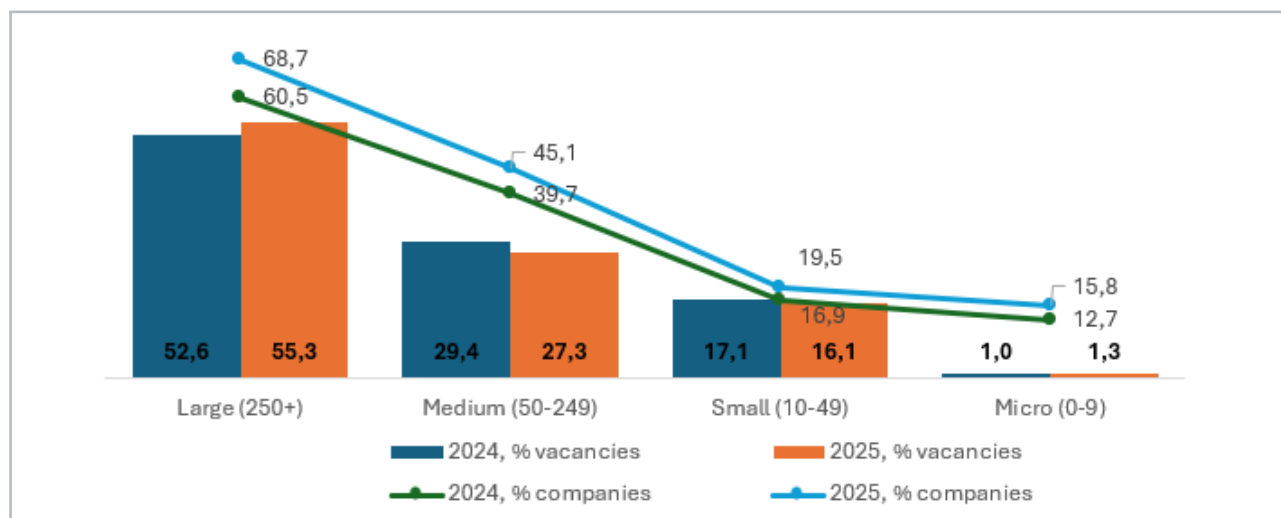


Fig. 22. Percentage of vacancies and percentage of enterprises with open vacancies, by enterprise size, %

By sector, the largest planned hiring is in manufacturing (27 thousand), trade (13.7 thousand), and healthcare (10.3 thousand). In some sectors, planned hiring exceeds the number of vacancies (Fig. 23), so this should correlate with enterprises' plans to create new jobs; however, the study does not provide data on the number of new jobs. The largest gaps are in healthcare and transport, where vacancies significantly exceed hiring plans. At the same time, in trade and agriculture planned hiring exceeds the number of vacancies. The combination of vacancies with staff reductions or "no change" in headcount usually indicates a structural shortage: some occupations are being released, while others remain scarce and unfilled (which is partly confirmed by the list of the most in-demand occupations, which remains virtually unchanged).

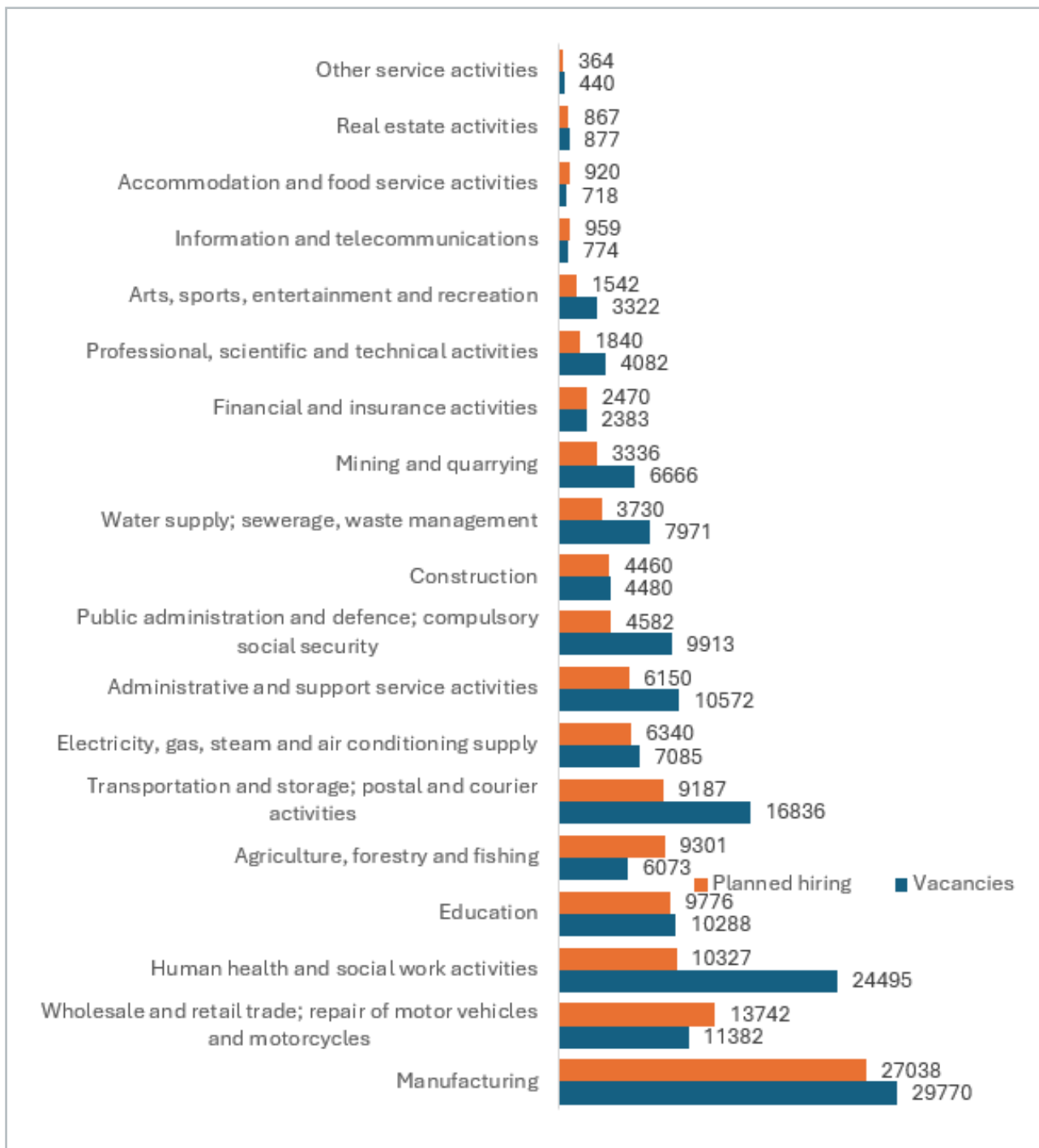


Fig. 23. Number of vacancies and planned hiring, by sector, number of persons

Regionally, the largest planned hiring is concentrated in Dnipropetrovsk oblast (11.1 thousand), Lviv oblast (10.1 thousand), and Kyiv City (9 thousand), while Luhansk oblast is almost absent from the market (38 vacancies), which is consistent with security constraints (Fig. 24). In Zaporizhzhia oblast, the largest gap between planned hiring and the number of vacancies is observed: vacancies exceed planned hiring by more than two times. In contrast, in Zhytomyr, Vinnytsia, and Volyn oblasts planned hiring is higher than the number of vacancies.

Overall, the share of employers planning to hire remains stable: 32.1% in plans for 2025 and 32.9% in plans for 2026 (Fig. 25). At the same time, actual hiring in 2025 was significantly higher at 67.4% (Fig. 26), indicating a gap between planning and employers' real behaviour.

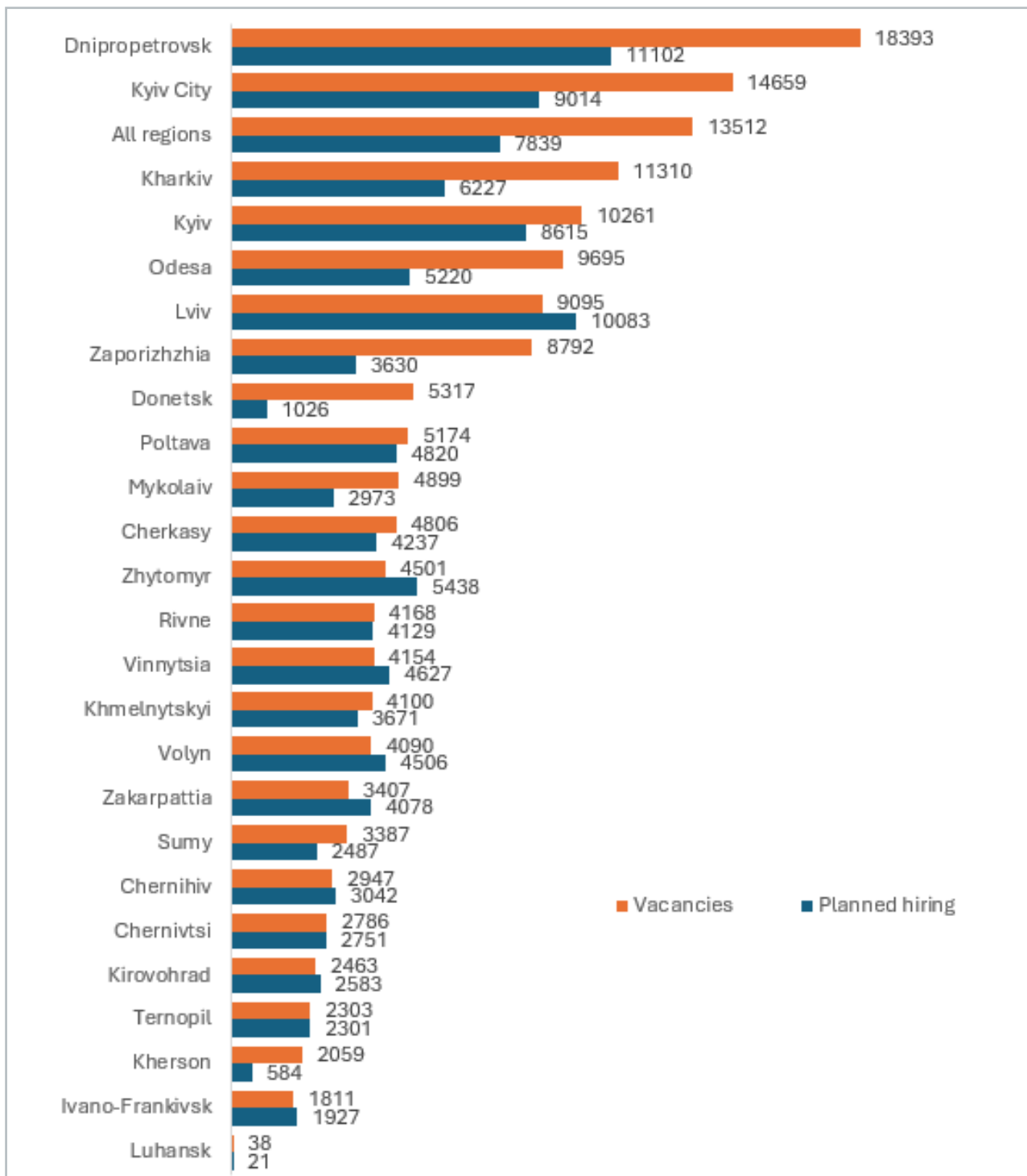


Fig. 24. Number of vacancies and planned recruitment, by region, number of persons

By enterprise size, the highest hiring plans are consistently reported by large enterprises: 69.1% in plans for 2025 and 71.1% in plans for 2026, the absolute maximum among all groups (Fig. 25). The lowest values are observed among micro enterprises, although even here there is an increase from 21.8% to 23.9%. Overall, the size-based structure is inertial, with no sharp breaks between years, pointing to stable expectations across businesses of different scales.

By sector, the highest shares of enterprises planning to hire, as in 2025, are recorded in water supply (47.9%), healthcare (46.6%), and energy (45.0%), although these sectors show almost no growth in production volumes (less than 10%). This indicates chronic staff shortages rather than expansion of activity.

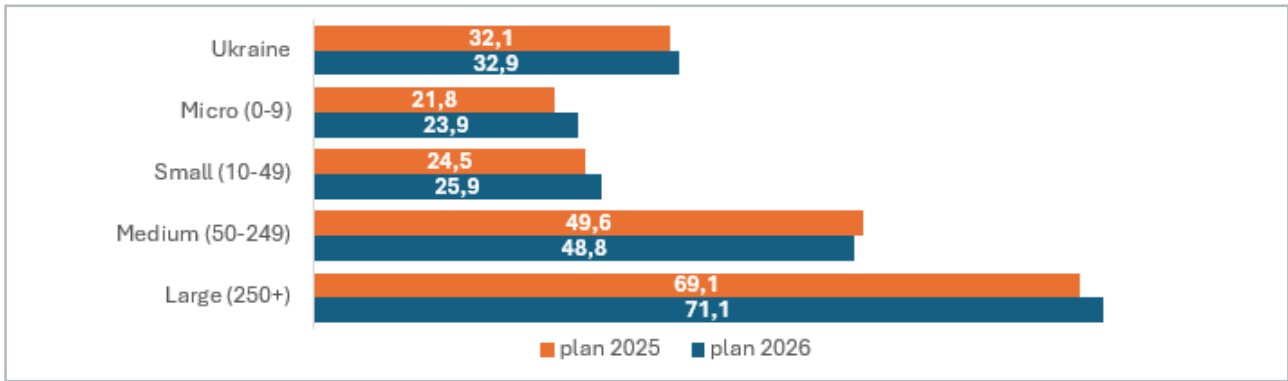


Fig. 25. Enterprises' plans to hire employees, % of respondents

2.2. ACTUAL HIRING

Actual data for 2025 contrast sharply with plans: 91.1% of large enterprises actually hired staff, the highest figure in the table (Fig. 26). High values are also observed among medium enterprises (82.9%), while micro enterprises (45.1%) remain at the minimum level. This confirms that large and medium companies are the main drivers of the labour market even under high uncertainty.

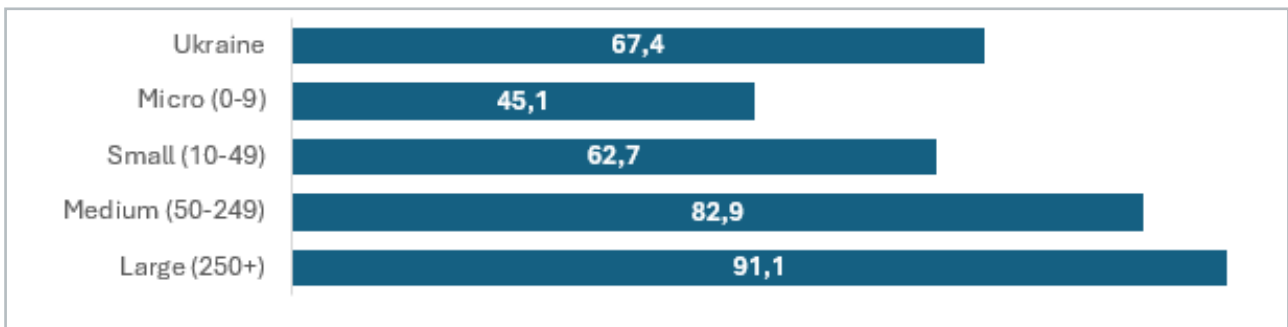


Fig. 26. Enterprises that hired employees in 2025, % of respondents



The sectoral analysis shows significant differentiation (Fig. 27). The highest actual hiring rates are recorded in: water supply and waste management – 79.8%; healthcare and social work – 75.3%; education – 73.6%. The lowest rates are observed in: real estate activities – 52.5%; other service activities – 53.1%; professional and scientific activities – 55.8%. This may indicate high staff turnover and the need for regular replenishment in socially important sectors, where workloads increase faster than the ability to retain staff (especially due to competition for talent, low wages, and migration).

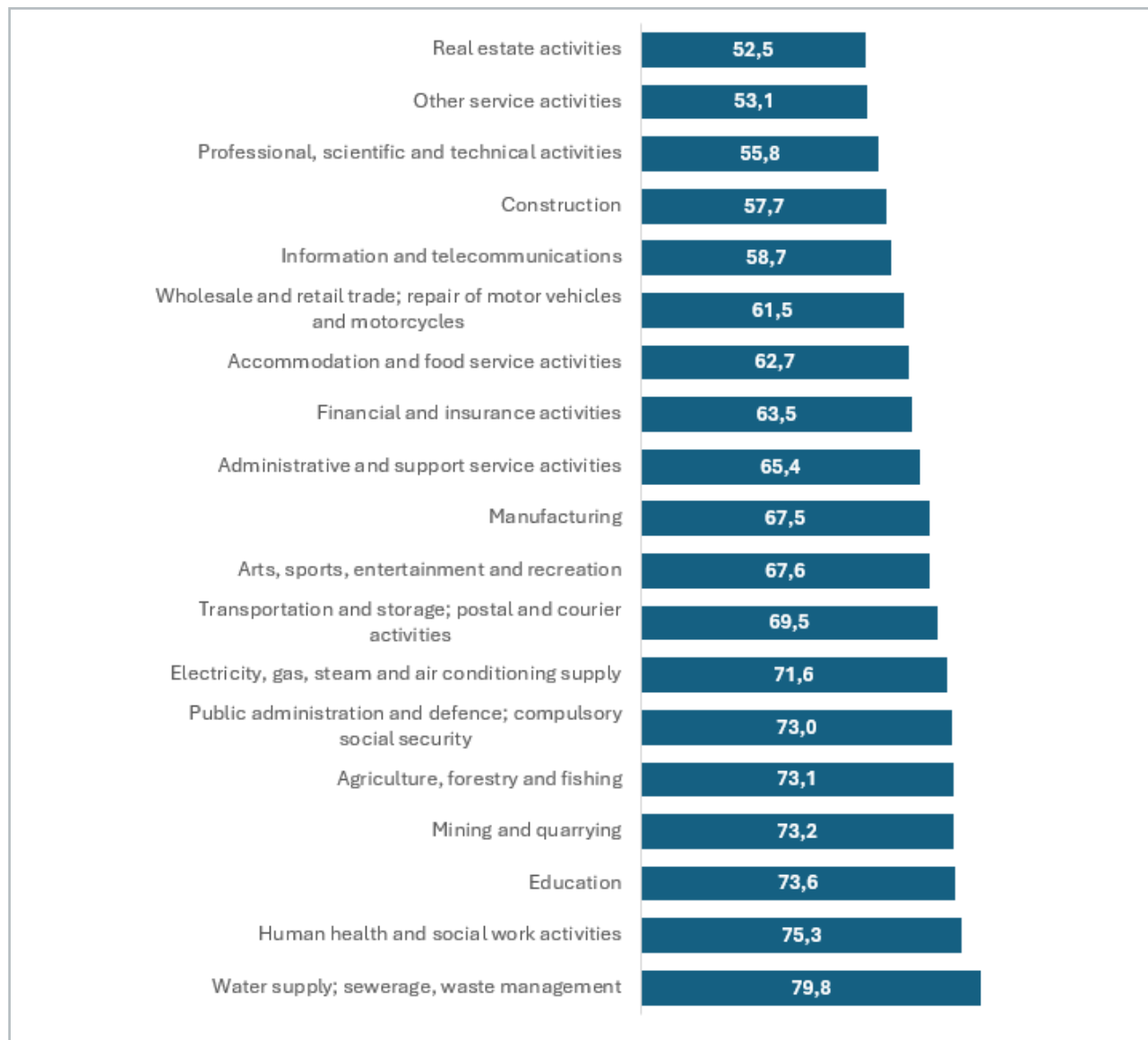


Fig. 27. Enterprises that hired in 2025, by sector, % of respondents

The regional picture is also polarised (Fig. 28_1). The highest percentages of enterprises that actually hired were recorded in Volyn (52.9%) and Zhytomyr (50.4%) oblasts. The absolute minimum is Kyiv City (17.6%), as well as Luhansk (20.5%) and Donetsk (22.7%) oblasts, reflecting different levels of security risks, migration flows and business relocation, and the fact that staff turnover is lower in Kyiv.

Among enterprises that reported increased production volumes, 84.5% carried out actual hiring, the highest figure among all groups; at the same time, among enterprises with declining production volumes 63.5% hired, and among enterprises with unchanged production volumes –

65.1%, indicating sustained labour demand even in the absence of, or amid a deterioration in, production dynamics.

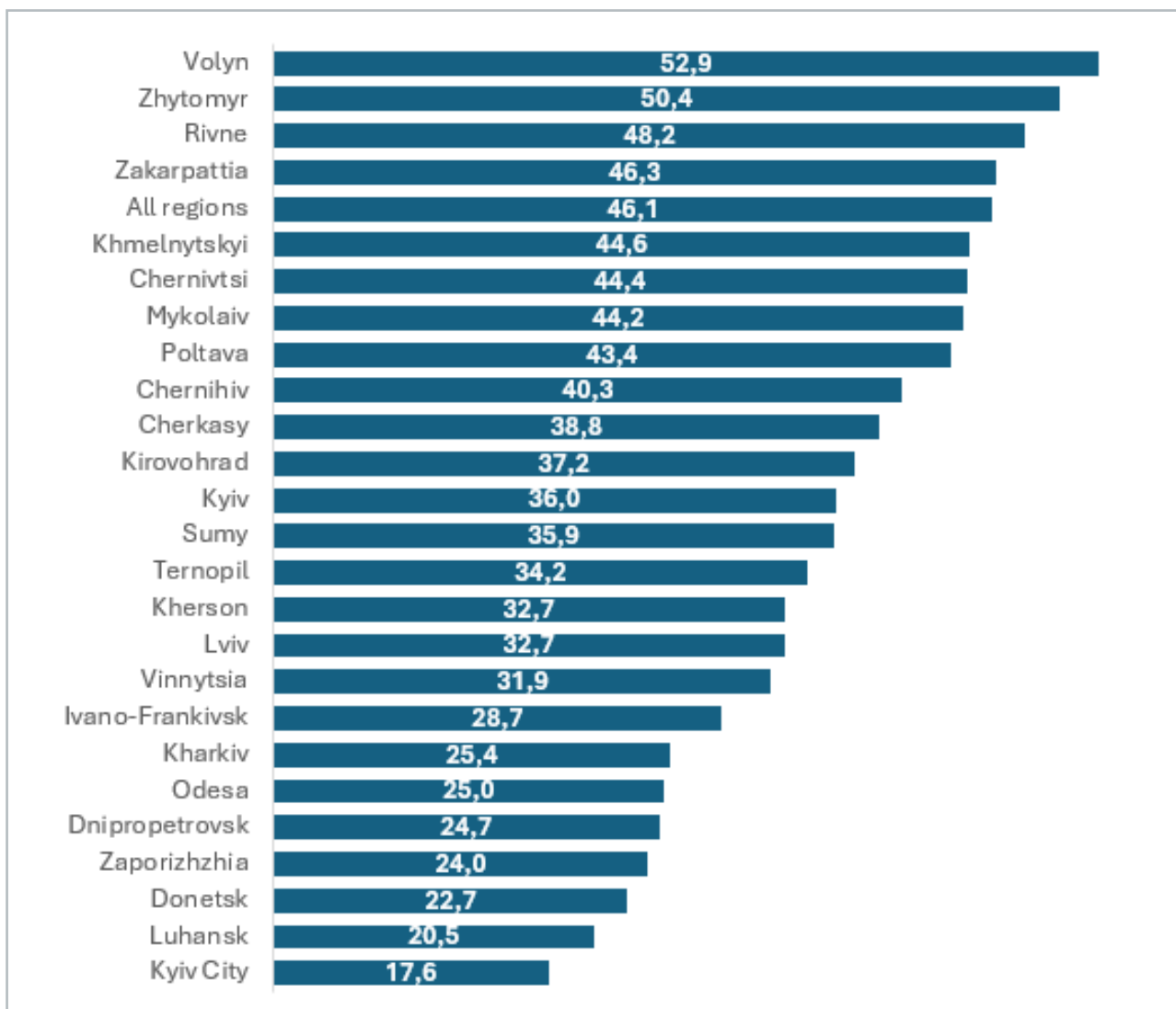


Fig. 28_1. Enterprises that hired 2025, by region, % of respondents

2.3. PLANS TO CREATE NEW JOBS

Plans to create new jobs remain generally cautious (12.21% on average), but show clear differentiation by enterprise size: the highest values are recorded for large enterprises (26.51%), which significantly exceed those for medium (14.81%), micro (14.06%), and especially small enterprises (10.21%), which represent the minimum in the structure. Compared to 2024, the structure retains the previous logic of concentrating new job creation in large businesses, while SMEs remain cautious about expanding headcount. This is consistent with the previously observed gap between actual hiring and plans and may be explained by demand uncertainty and financial constraints.

2.4. DIFFICULTIES IN RECRUITING STAFF

A comparison of 2024 and 2025 shows that recruitment difficulties are becoming more systemic – they affect a wider range of enterprises, intensify in key sectors, and are increasingly driven not only by labour shortages, but also by institutional and mobilisation constraints. This

means that in 2025 staff shortages are not a temporary phase, but a persistent feature of how the labour market functions.

In 2025, the share of enterprises that faced difficulties in recruiting staff increased from 31.7% to 38.5% (Fig. 28_2), indicating a further deterioration in labour market conditions. This problem intensified most noticeably among large enterprises, where the respective indicator rose from 56.5% in 2024 to 65.6% in 2025, while among micro enterprises the increase was much more moderate – from 23.8% to 26.1%. This indicates that labour shortages are increasingly concentrated among systemic employers that require a large and stable workforce.

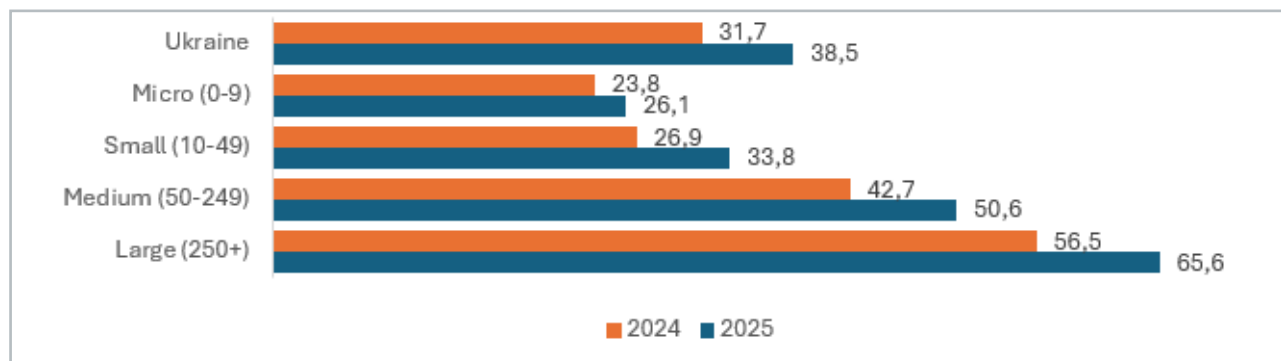


Fig. 28_2. Share of enterprises that faces difficulties in recruiting staff, by enterprise size

By sector in 2025, recruitment difficulties were most often reported by enterprises in healthcare (45.8%), education (43.4%), manufacturing (44.8%), and water supply and waste management (47.9%). Compared to 2024, the most noticeable increase was recorded in construction (from 29.3% to 37.5%) and trade (from 24.8% to 32.5%), which may be linked to simultaneous demand recovery and constrained labour supply. At the same time, in other service activities the share of enterprises with staffing difficulties decreased from 29.8% to 26.0%, setting this sector apart from the overall worsening trend (Fig. 29).



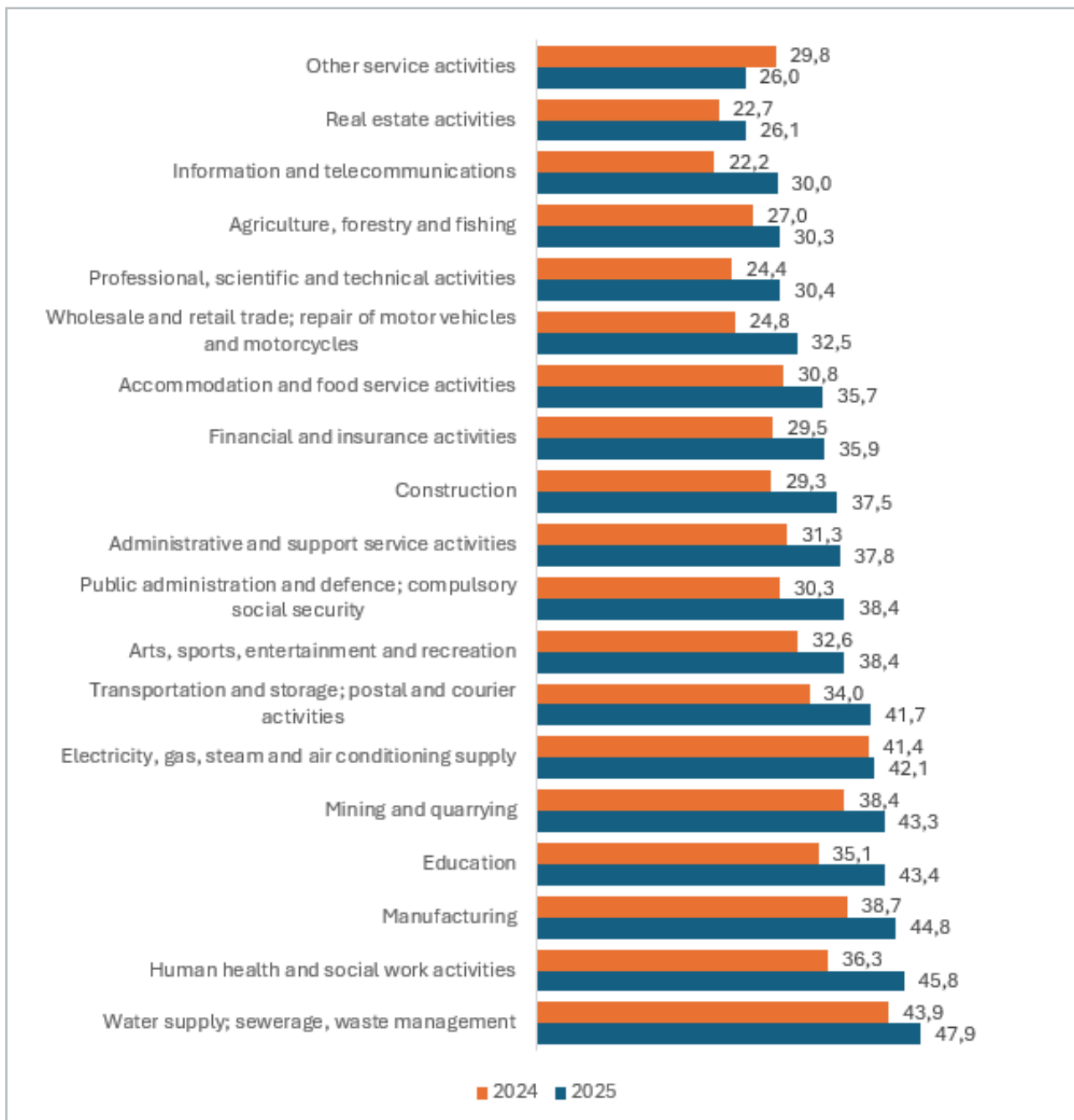


Fig. 29. Percentage of enterprises that experienced difficulties in recruiting staff, by sector

Regional differences in 2025 became more pronounced than in 2024 (Fig. 30). The highest shares of enterprises reporting recruitment difficulties were recorded in Volyn (54.3%), Khmelnytskyi (52.8%), and Rivne (48.3%) oblasts, while in Luhansk oblast this indicator was 15.4%, reflecting different levels of economic activity and labour demand. The dynamics of Kyiv City are also noteworthy: the share of enterprises with staffing difficulties decreased from 41.6% to 32.2%, which contrasts with the nationwide trend and may reflect a reallocation of labour in favour of the capital and stronger competition among employers in other regions.

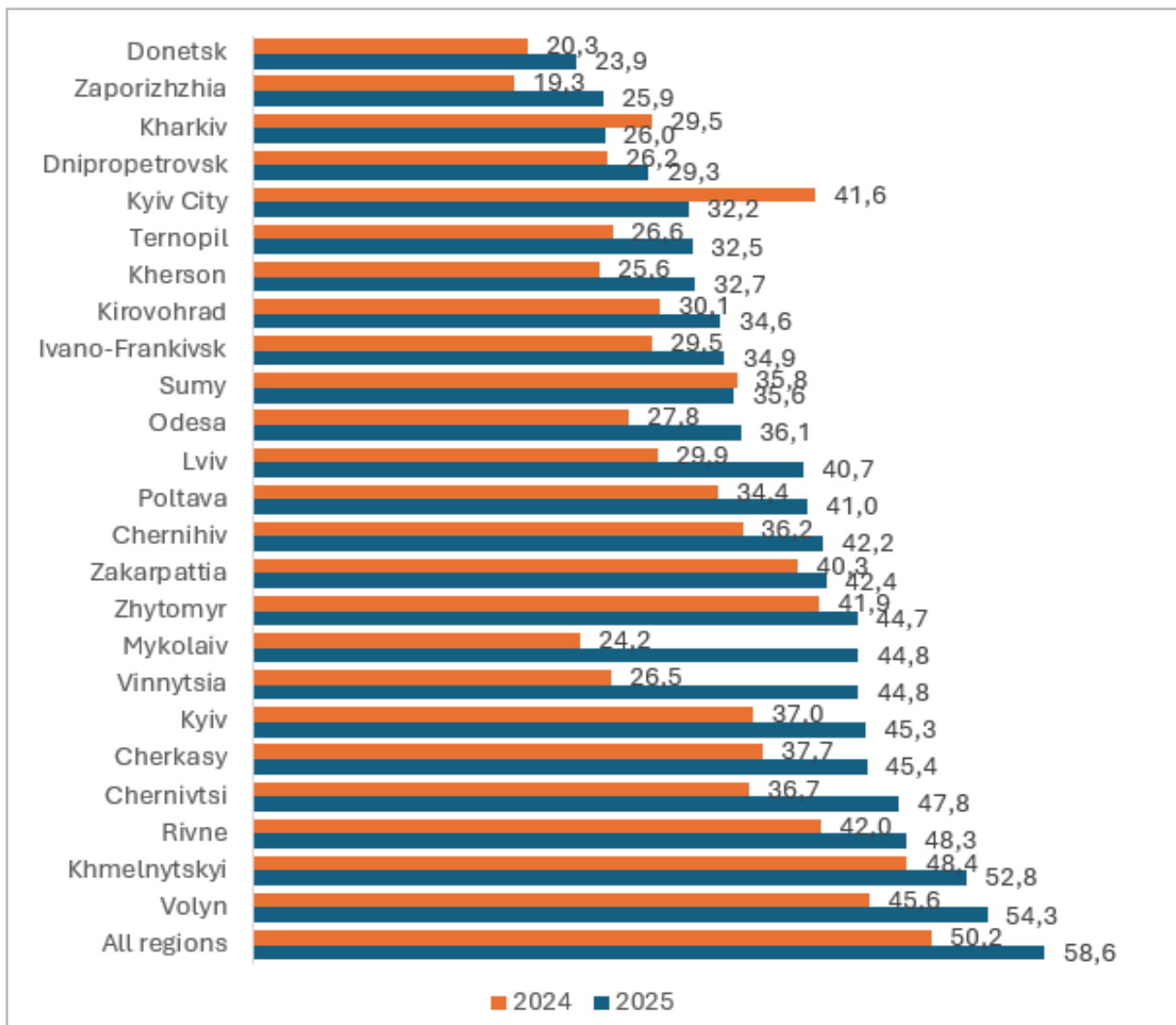


Fig. 30. Percentage of enterprises that experienced difficulties in recruiting staff, by region

An analysis of the reasons for recruitment difficulties shows a shift in their structure by frequency of mention between 2024 and 2025 (Fig. 31). In 2024, the dominant factors were labour shortages (39.2%) and the mobilisation factor (25.5%), while in 2025 labour shortages remain the key driver (39.9%), but the importance of documentation issues and mismatches in expected wages increases. The declining importance of insufficient professional skills may indicate both employers' willingness, under labour shortages, to hire candidates with any skill level and provide on-the-job training (which is supported by an increase in the share of enterprises that organised staff training; Fig. 36), and the availability of upskilling and retraining offers in the education services market.

The reduced role of men's unwillingness to take formal employment may reflect market "saturation", meaning that those for whom mobilisation risk is critical have already exited the formal labour market earlier (informal employment, migration, self-employment). In the current sample, employers more often encounter candidates who have already accepted these risks.

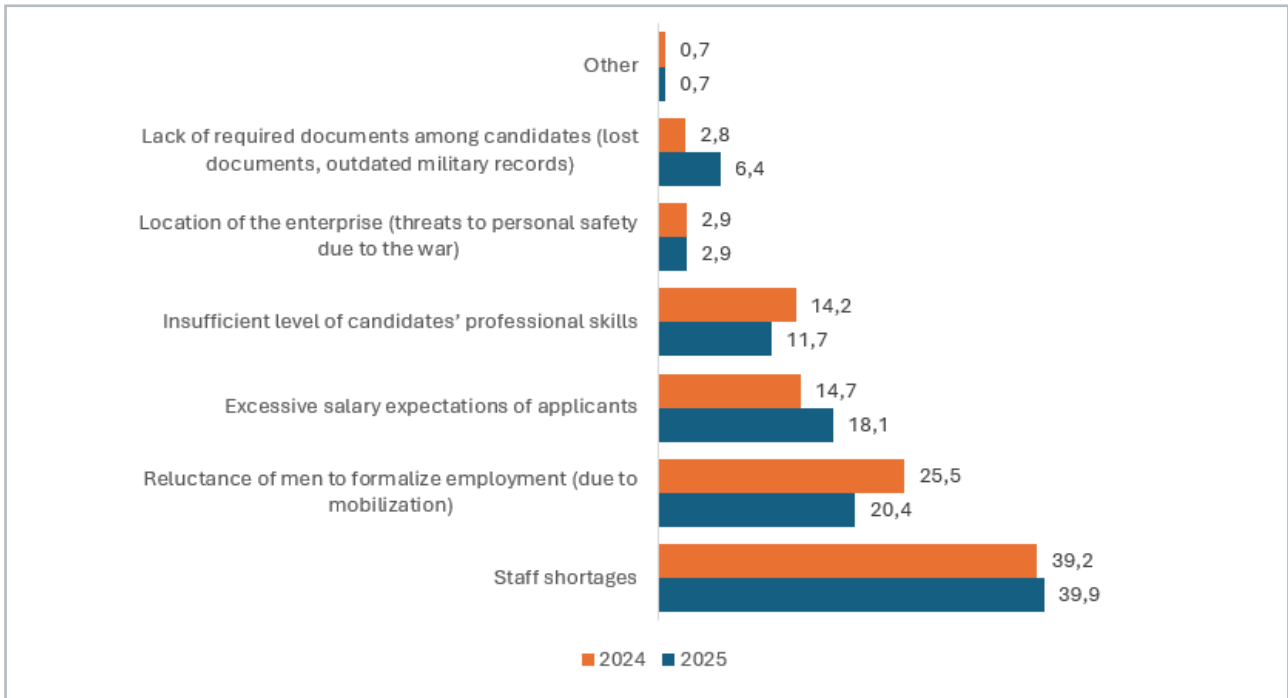


Fig. 31. Hiring difficulties by frequency of mentions , %

By sector in 2025, labour shortages as a reason for recruitment difficulties are most often reported in accommodation and food service activities (45.0%), healthcare (44.2%), and education (41.7%), while elevated wage expectations are most characteristic of education (27.9%), public administration (24.6%), and arts and culture (25.8%). By contrast, in mining and quarrying and in water supply, mobilisation constraints are more often cited (26.7% and 27.5%, respectively), highlighting the sector-specific gender profile of employment (Fig. 32).



Image from Helvetas

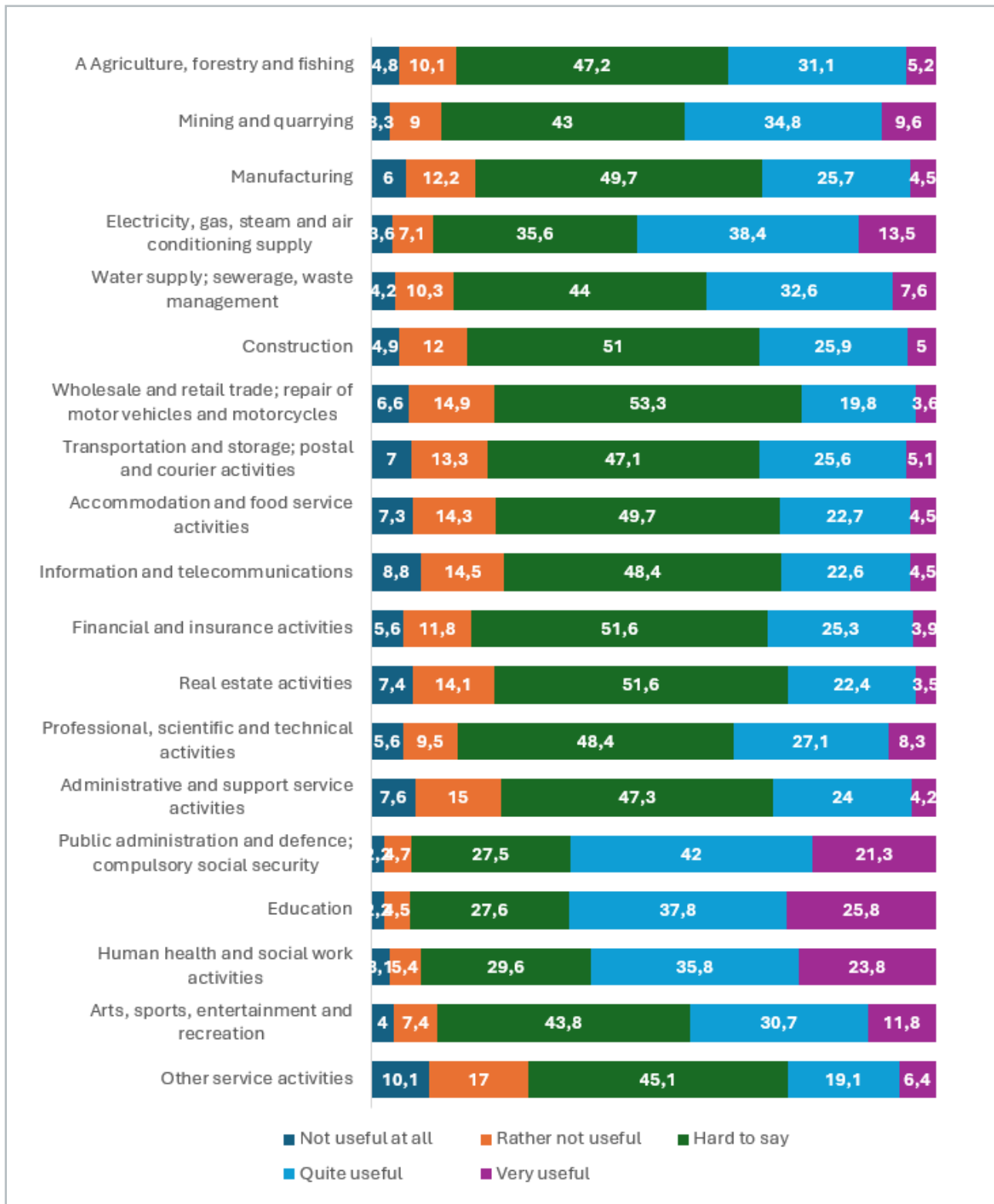


Fig. 32. Percentage of enterprises for which confirmation of professional qualification centre is useful, by sector

2.5. OCCUPATIONAL STRUCTURE OF HIRING

An analysis of the structure of labour demand by occupational groups in 2025 indicates a noticeable shift in emphasis compared to 2024 (Fig. 33). The absolute peak of demand in 2025 is concentrated among plant and machine operators and assemblers (25.4%), matching the previous year's level and confirming sustained demand for operators and machine drivers in industry. At the same time, the share of demand for skilled trades workers declined significantly, from 25.9% to 20.2%, which may indicate partial saturation of this segment or a shift of some demand towards adjacent blue-collar occupations.

The most notable increase was recorded among professionals, from 10.5% to 15.4%, pointing to a gradual shift in demand towards higher-skilled labour. Moderate growth is also observed among technicians and associate professionals (from 6.2% to 7.3%) and among service and sales workers (from 7.2% to 9.3%), reflecting the economy's adaptation to a more service- and management-oriented logic. By contrast, elementary occupations (from 12.0% to 10.8%) and clerical support workers (from 3.8% to 3.1%) lose share in the overall demand structure, which may be linked to automation and optimisation of support functions. Overall, the 2025 demand structure reflects a combination of persistent shortages of blue-collar labour and a gradual increase in the need for professionals and specialists, which signals a slow but systemic transformation of the labour market.

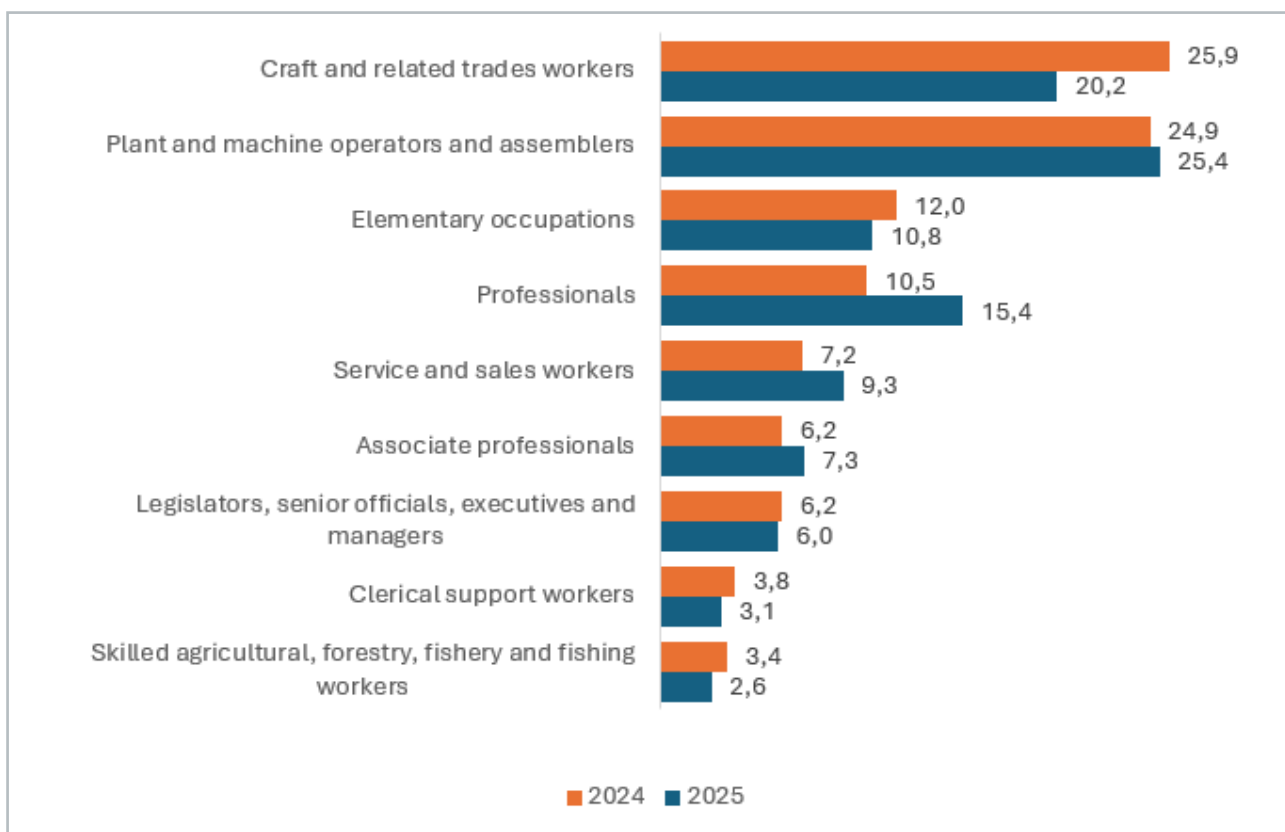


Fig.33. Occupations for which employers plan to hire employees, %

A comparison of 2024–2025 shows increased demand for plant and machine operators in critical infrastructure (energy, transport) and consistently high demand for skilled workers in construction and industry, driven not by output growth but by chronic staff shortages and replacement of workers who have left. In particular, among skilled trades workers the absolute peak in 2025 is again in construction (56.6% compared to 52.5% in 2024), mining and quarrying

(49.0%), and manufacturing (45.3%). At the same time, water supply moved from the 2024 peak (55.0%) to a mid-level position (40.9%). Meanwhile, the highest demand for plant and machine operators and assemblers in 2025 is observed in energy (66.3%), transport and logistics (64.2%), and agriculture (46.8%), as in 2024 (45.0%, 49.2%, and 40.7%, respectively).

In 2024, Donetsk and Dnipropetrovsk oblasts were the leaders, while in 2025 skilled workers are most in demand in Chernivtsi (39.2%), Dnipropetrovsk (31.2%), and Zakarpattia (30.4%) oblasts.

2.6. IN-DEMAND OCCUPATIONS AND SKILLS

An analysis of respondents' answers regarding in-demand occupations shows that demand is extremely concentrated: although employers need workers in more than 2,000 occupations, 70% of all vacancies are accounted for by only 105 occupations. The absolute peak of demand is formed by blue-collar occupations, primarily drivers and mobile plant operators and attendants (14.7 thousand persons), metal and machinery trades (13.0 thousand), and industrial machinery operators (9.2 thousand). Among knowledge-based occupations, teachers show the highest demand (6.7 thousand), but with a significantly lower average wage (11.9 thousand UAH) compared to blue-collar occupations (Table 2). As in 2024, the single most in-demand occupation remains motor vehicle driver, confirming the inertial nature of staff shortages. As we can see, the most in-demand occupations are blue-collar. This correlates with the employment structure (Fig. 13).

Occupational subgroup	Persons	Most in-demand occupations within the subgroup	Persons	Weighted average wage, thousand UAH
83. Drivers and mobile plant operators and attendants	14721	Driver	6729	18,7
72. Metal and machinery trades workers	13009	Welders Fitters/locksmiths	2029 4359	21,5 18,3
81. Industrial machinery operators	9197	Machine operators	3197	19,3
23. Teachers	6661	Teacher	2278	11,9
74. Other skilled trades workers	5962	Seamstress	3166	15,6

Table 2. Most in-demand occupations

Notably, the hardest-to-fill occupations are precisely those that are most in demand: employers report the greatest recruitment difficulties for drivers, teachers, machinery trades workers, and managers; and at the level of specific occupations – again for driver, teacher, manager, tractor operator, and healthcare workers. This indicates a persistent gap between demand and supply that is reproduced year after year (Table 3 and Table 4).

Occupational subgroup	Frequency of mention
83 Drivers and mobile plant operators and attendants	2815
23 Teachers	1830
72 Metal and machinery trades workers	1585
12 Managers of enterprises, institutions and organisations	1477
22 Life science and medical science professionals	1398

Table 3. Occupational groups for which it is hardest to find workers

Occupation	Frequency of mention
Motor vehicle driver	1298
Teacher at a general secondary education institution	693
Manager	669
Tractor operator (agricultural/forestry production)	638
Preschool educator	374
Seamstress	354
Nurse	327
General practitioner – family doctor	291
Tractor driver	215
Cook	211

Table 4. Occupations for which it is hardest to find workers

As in 2024, in 2025 the highest demand remains for skilled workers, workers who do not require qualifications, and plant and machine operators. In particular, the most needed are:

- in agriculture, forestry and fishing, tractor operators, auxiliary workers, and drivers;
- in mining and quarrying, electrician-fitters, drivers, welders, and machine operators;
- in manufacturing, seamstresses, packers and loaders, wiring harness assemblers, machine tool operators, and fitters;
- in energy, boiler operators, machine operators, and electricians;
- in water supply, fitters, drivers, landscaping/municipal maintenance workers, and electricians;
- in construction, road workers, concrete workers, bricklayers, and assemblers/installers;
- in trade, salespersons, pharmacists, and managers;
- in transport, drivers;
- in the hotel and restaurant business, cooks, waiters, and chambermaids;
- in information and telecommunications, software engineers and managers;
- in education, teachers in general secondary and higher education, preschool educators, and machine operators (stokers);
- in healthcare, nurses, general practitioners, social workers, and paramedics.

The structure of demand by skills shows a clear predominance of technical skills (10.7 thousand mentions), while digital (1.9 thousand) and project skills (1.1 thousand) remain on the periphery of requirements, which partly explains limited labour mobility across sectors (Fig. 34).

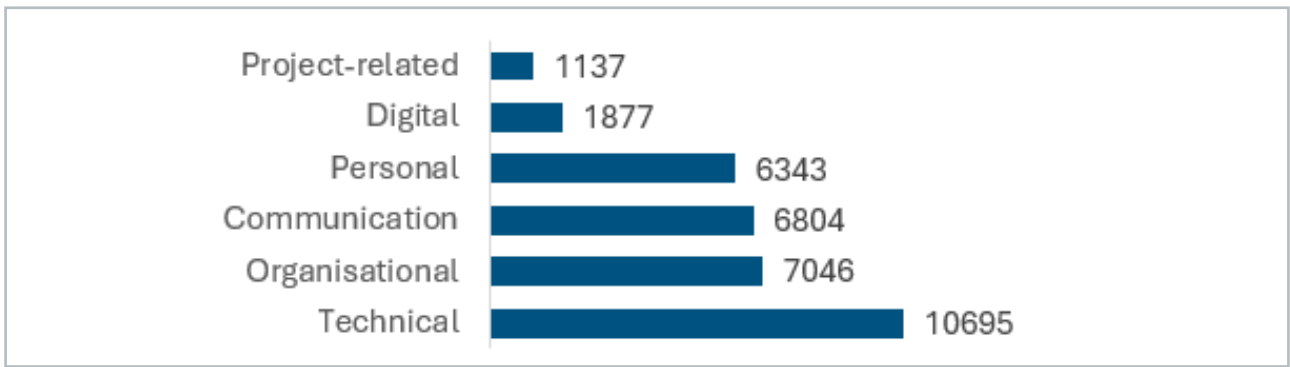


Fig. 34. Frequency of mentions of in-demand skills

The structure of in-demand skills by occupational groups clearly reflects the nature of the work performed (Fig. 35). For blue-collar groups (skilled trades workers; plant and machine operators), technical skills remain the absolute dominant category (3.0–3.7 thousand mentions), while communication and digital skills play a supporting role, consistent with these groups’ production specialisation. By contrast, among professionals, technicians, and managers, organisational and communication skills have the highest values, and the share of digital and project skills increases significantly, reflecting the managerial and knowledge-intensive nature of work.

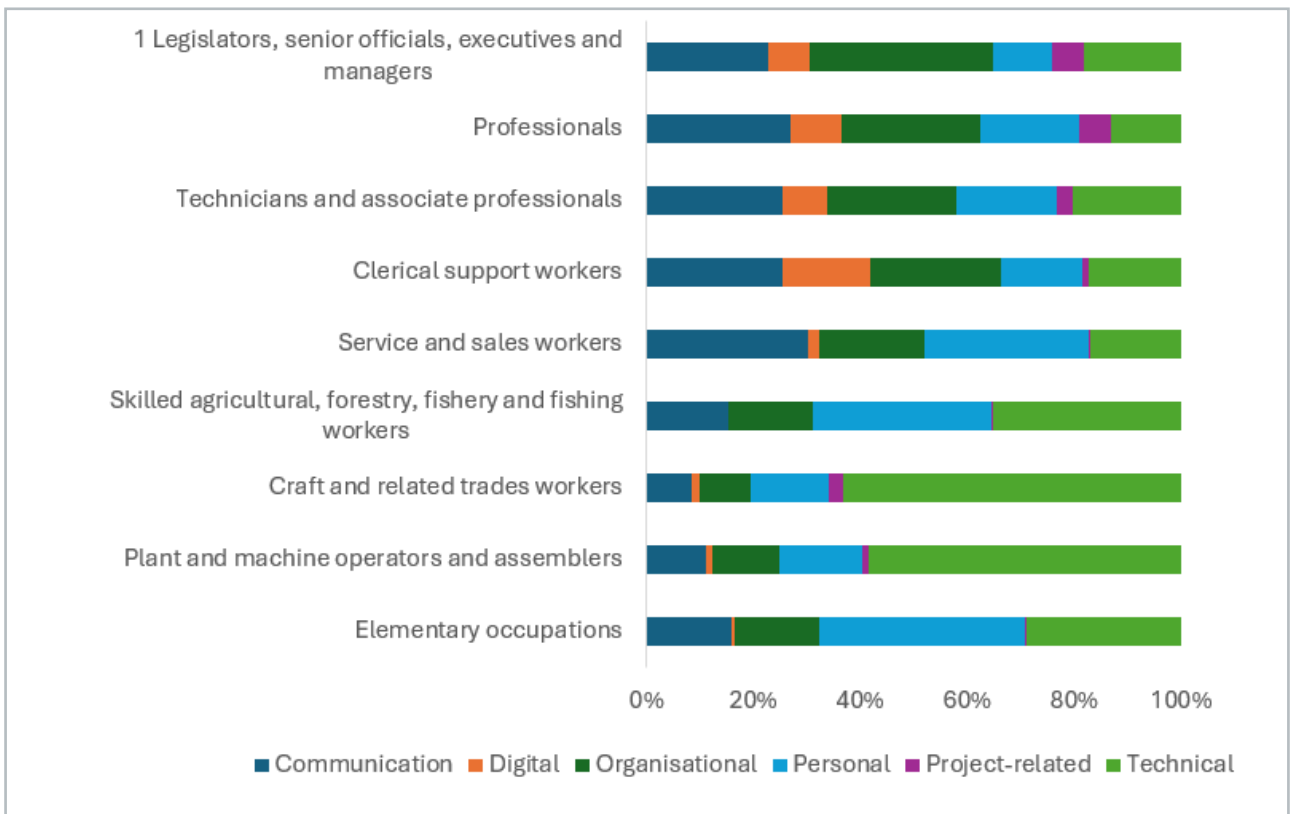


Fig. 35. Frequency of mentions of in-demand skills by occupational sections

3. STAFF DEVELOPMENT AND SUPPORT

3.1. TRAINING

Compared to 2024, staff training became more widespread in 2025, but at the same time more differentiated by enterprise size, sector, and region. The role of internal and digital training formats increased, while instruments of formal qualification recognition are used to a limited extent and remain unevenly integrated into employers' practices.



In 2025, the share of enterprises that organised training for employees increased from 31.4% to 33.7%, although this growth is uneven by business size (Fig. 36). The most pronounced increase in training activity was observed among large enterprises, from 62.9% in 2024 to 71.6% in 2025, while medium-sized enterprises show more moderate growth (50.1% → 52.8%), and small and micro enterprises remain significantly less engaged (26.3% and 17.6%, respectively). This indicates a growing role of internal staff development systems specifically in large businesses, which simultaneously experience more acute staff shortages. Large employers have more resources for systematic training and a stronger incentive to invest in staff development, as replacing workers in mass positions becomes more costly.

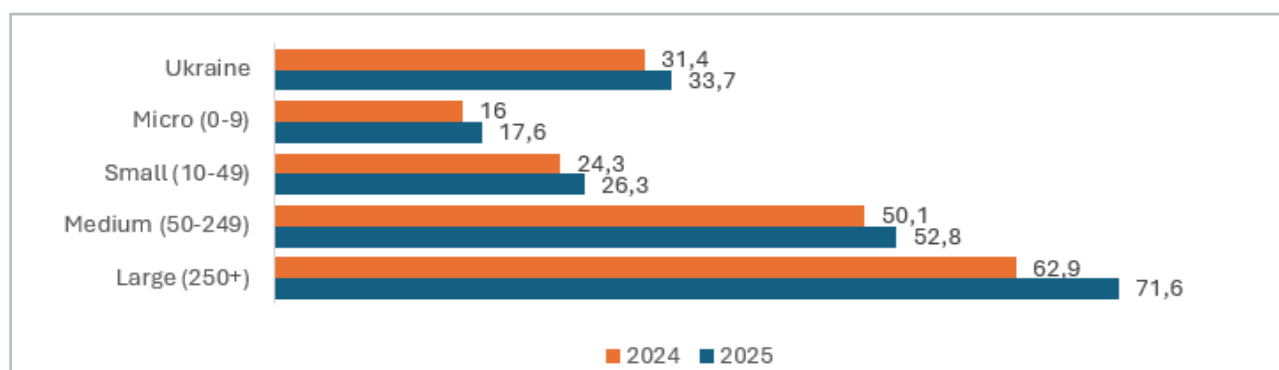


Fig.36. Percentage of enterprises that organized training for employees

The sectoral breakdown confirms increasing polarisation between sectors (Fig. 37). The highest shares of enterprises investing in training are observed in public administration (62.6%), education (59.6%), and healthcare (58.1%), while in construction (20.6%), trade (21.6%), and accommodation and food service activities (22.8%), training covers only about one fifth of enterprises. Compared to 2024, the most noticeable growth was recorded in financial activities (41.9% → 47.0%) and ICT (23.2% → 29.8%), which is consistent with higher competence requirements in these sectors and relatively low costs of organising such training.

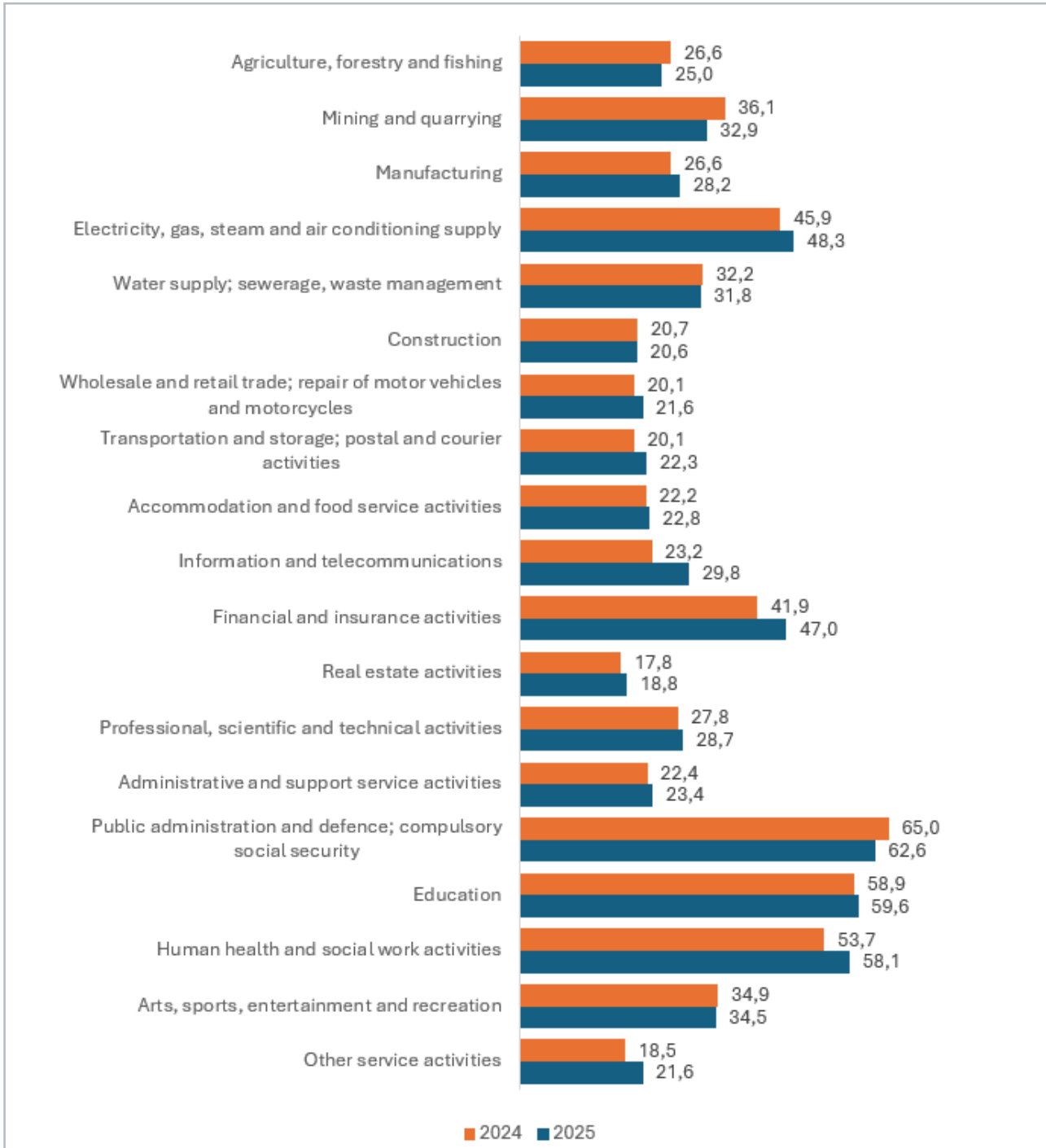


Fig. 37. Percentage of enterprises that organized training for employees, by sector

Regional differences remain stark (Fig. 38). In 2025, training was most often organised by enterprises in Luhansk (69.2%) and Kherson (53.6%) oblasts, while in Kyiv City this indicator declined from 36.3% to 23.9%..

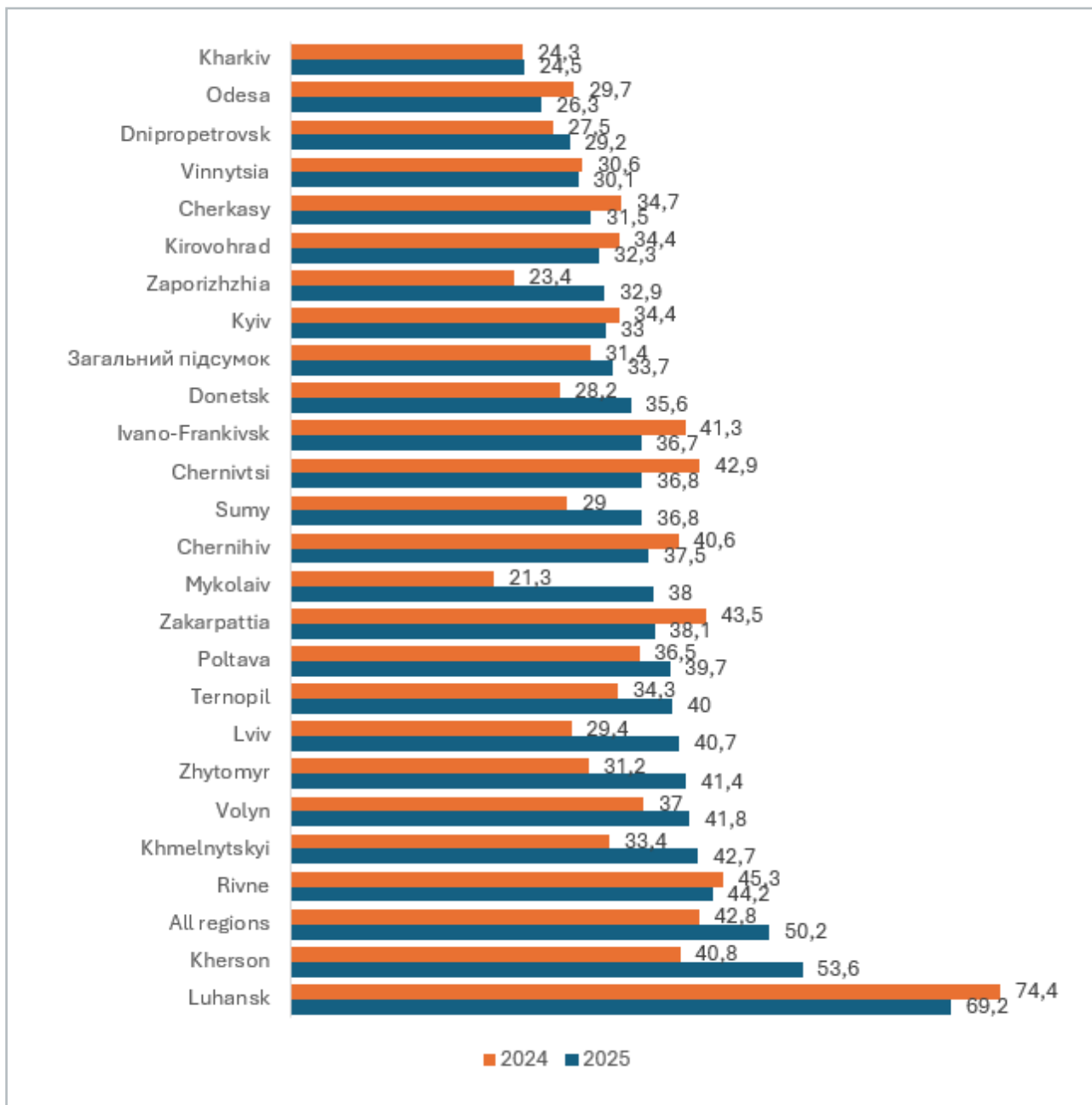


Fig. 38. Percentage of enterprises that organized training for staff, by region

A comparison of training formats in 2024 and 2025 indicates a change in their structure (Fig. 39_1). The share of on-the-job training decreased from 65.0% to 56.0%, while the use of in-house training centres (14.3% → 17.8%) and online platforms (25.4% → 26.8%) increased. At the same time, the use of qualification recognition in qualification centres declined from 34.9% to 27.7%, which may indicate the complexity or limited accessibility of this procedure for employers.

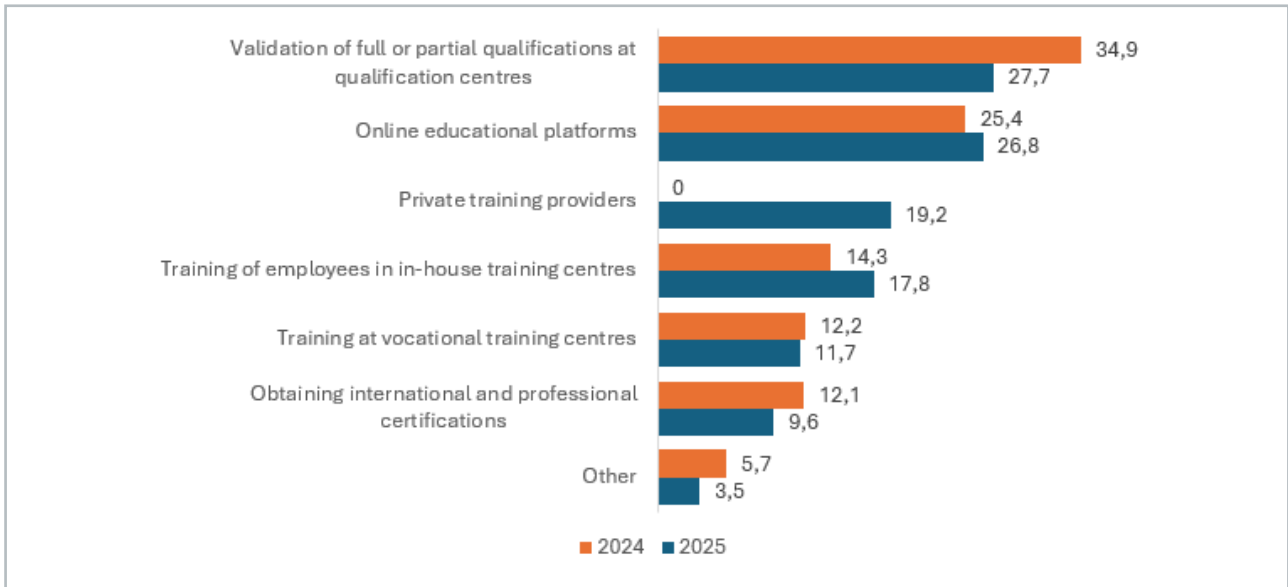


Fig. 39_1. Percentage of enterprises that applied selected form of training

3.2. QUALIFICATION RECOGNITION

Requirements for formal recognition of education remain high, but vary significantly across segments (Fig. 40 and Fig. 41). A state-recognised certificate is considered important by 80.1% of large enterprises compared to 42.5% of micro enterprises. By sector, this requirement is almost universal in education (93.6%), healthcare (88.5%), and public administration (91.3%), while in trade (42.3%) and accommodation and food service activities (38.4%) it is much weaker, reflecting different entry models to the labour market.



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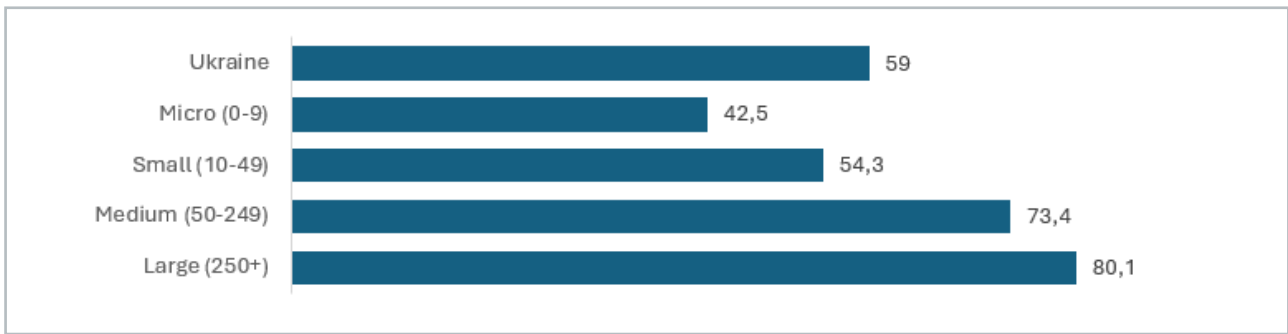


Fig. 39_2. Percentage of enterprises for which the availability of a state-recognized educational certificate is important when hiring a job candidate

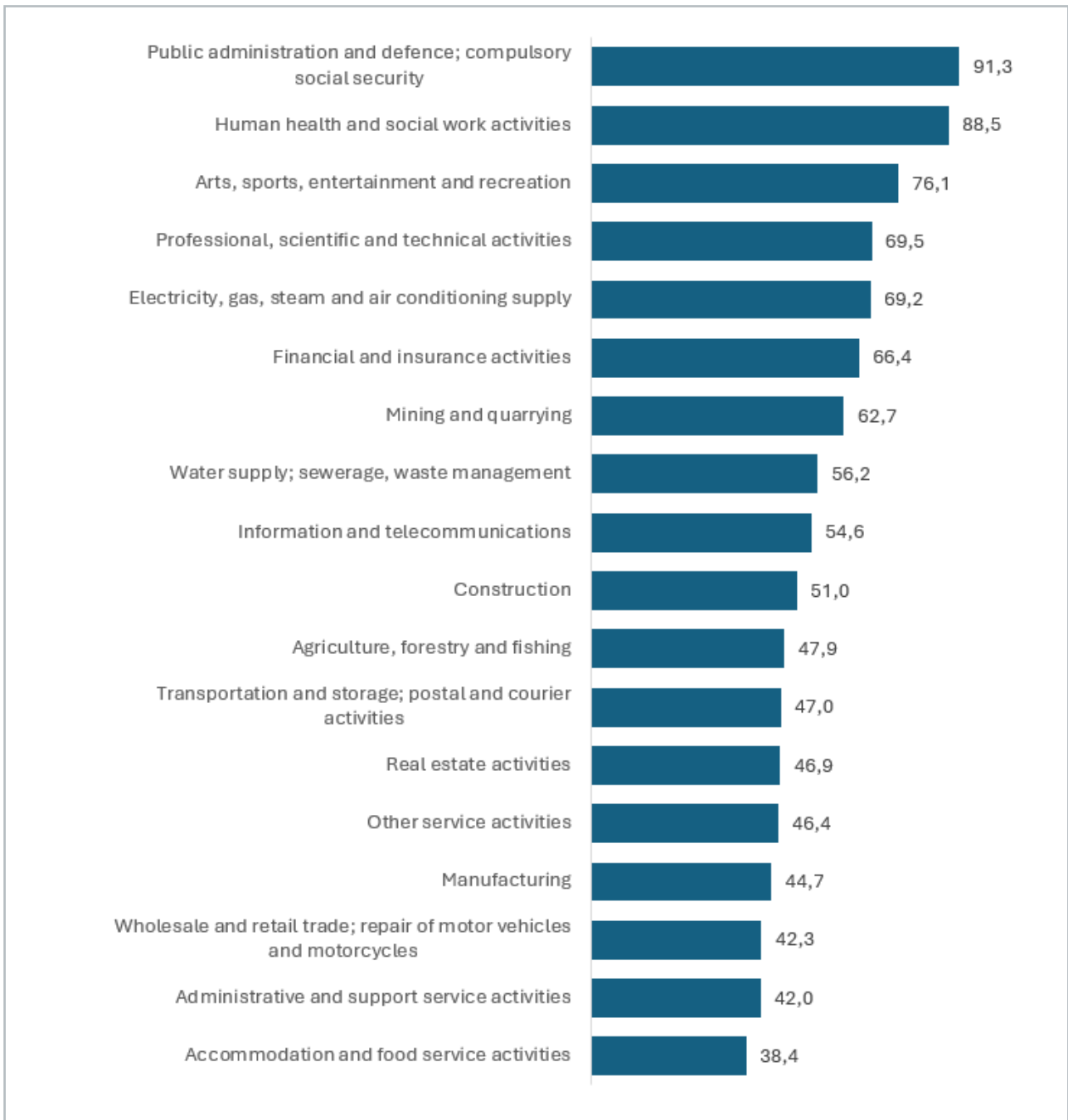


Fig.40. Percentage of enterprises for which possession of a state-recognized education certificate is important for a job candidate, by sector

The assessment of the usefulness of professional qualification recognition in qualification centres shows a cautiously positive attitude among employers (Fig. 41). In 2025, the share of enterprises that consider such recognition “quite” or “very” useful amounted to 38.3% overall, but reached 53.6% among large enterprises. At the same time, almost half of small and micro enterprises chose the response “hard to say”, indicating insufficient awareness or lack of practical experience. Sectorally, the highest usefulness ratings are reported in public administration, education, and healthcare, where the share of “very useful” responses exceeds 35%, while in trade, ICT, and real estate activities moderate or uncertain assessments prevail.

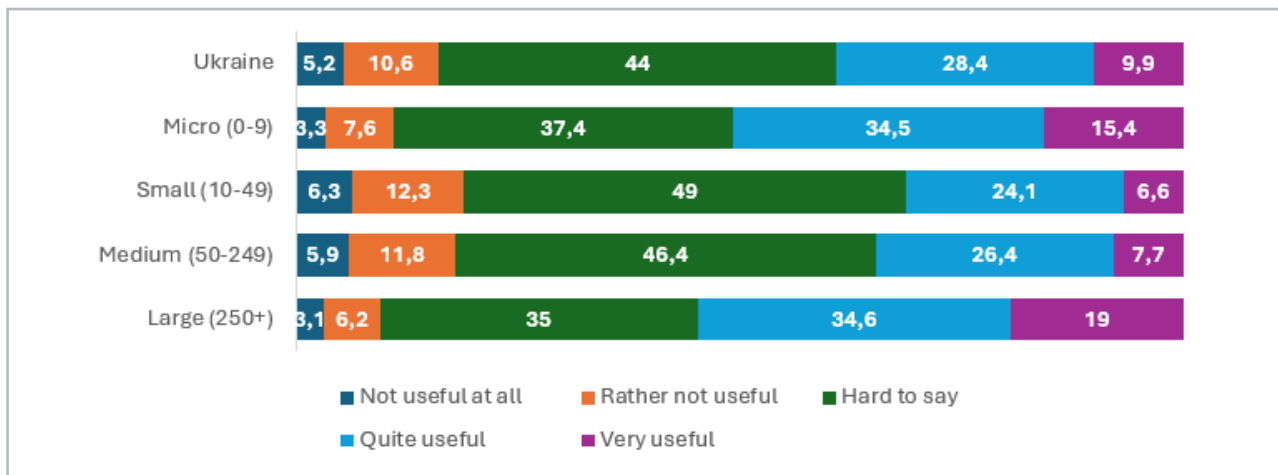


Fig. 41. Percentage of enterprises for which confirmation of professional qualifications at a qualification center is useful, by enterprise size

3.3. WAGES

An analysis of data on wages and social support indicates intensified competition for staff in 2025. The share of employers planning wage increases rose from 35.0% in 2024 to 55.6% in 2025, with the maximum recorded among large enterprises (64.2%) and the minimum among micro enterprises (50.3%) (Fig. 42). This dynamic reflects worsening staff shortages, rising wage expectations among employees, and increased competition between employers. Wage increases may be used more often as a targeted tool to retain critical workers.

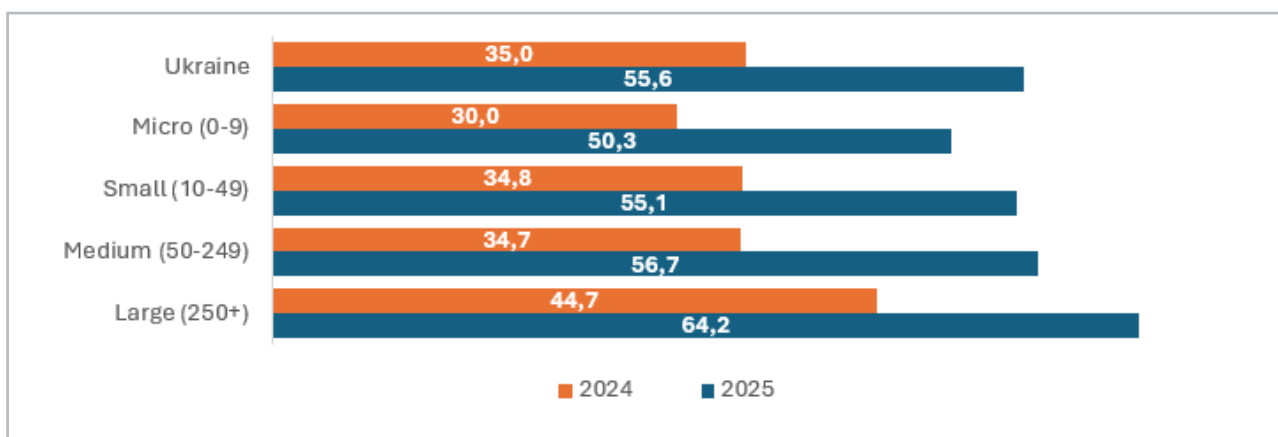


Fig. 42. Percentage of enterprises planning to increase wages, by size

By sector, the highest readiness to increase wages is demonstrated by agriculture (67.1%), energy (60.9%), and manufacturing (60.8%), reflecting competition for technical and blue-collar workers, while professional and scientific activities (46.2%) and public administration (45.8%) remain at lower levels, which may be explained by tighter budgetary and regulatory constraints (Fig. 43). Regionally, Volyn (75.4%), Zhytomyr (71.2%), and Lviv (69.5%) oblasts lead, while Donetsk (33.5%) and Zaporizhzhia (38.6%) show the lowest values, which is logically linked to security risks and more restrained economic expectations (Fig. 44).

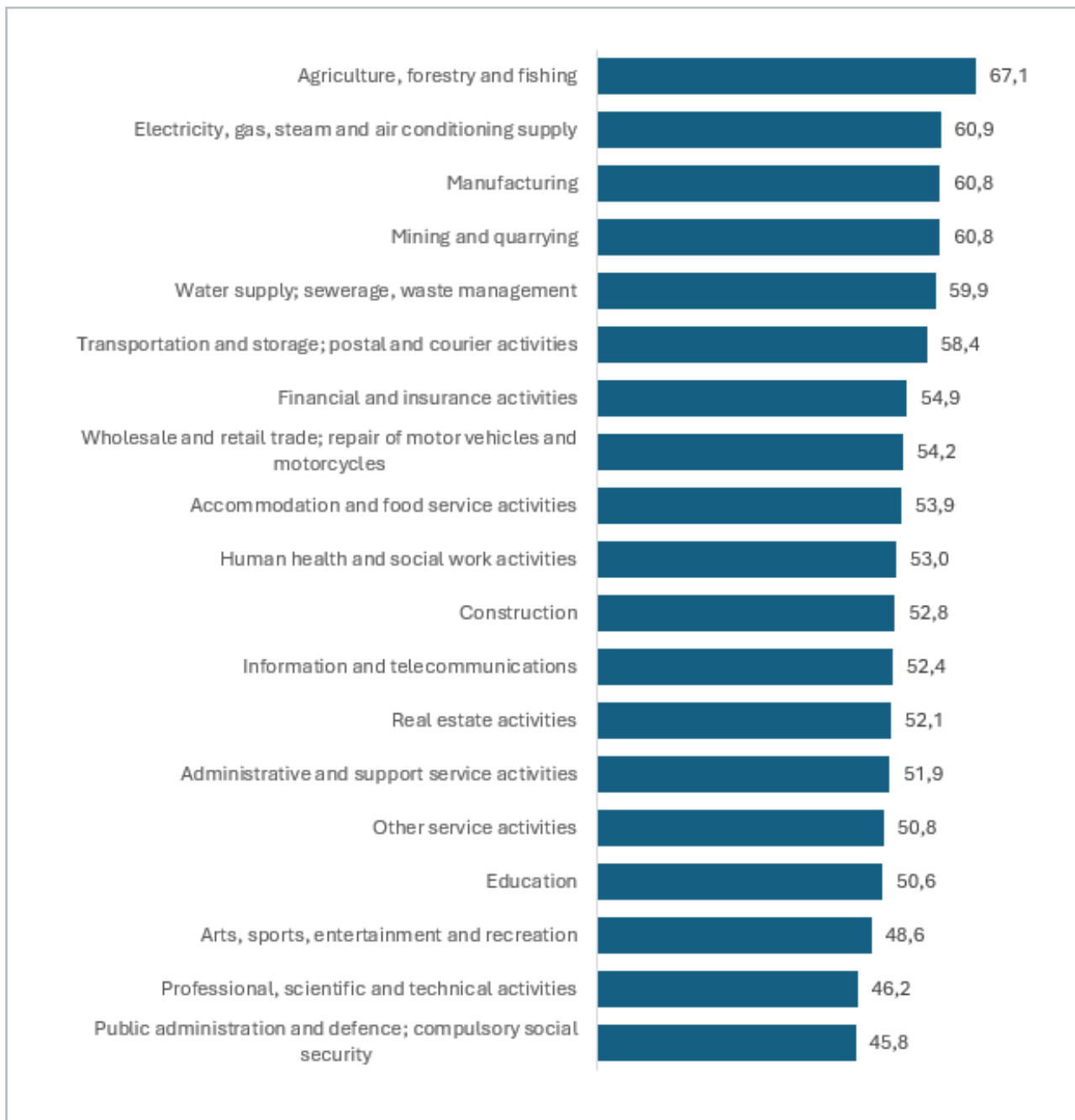


Fig. 43. Percentage of enterprises planning wage increases, by sector

At the same time, the size of planned wage increases remains moderate: increases of up to 10% or within the range of 10–20% prevail, while the share of employers ready to raise wages by 20–50% is small (around 5%), indicating limited financial resources of businesses (Fig. 45). Despite the fact that the majority (64.2%) of large enterprises plan wage increases, more than half of them (51.3%) have not yet determined the size of the increase for 2026. This appears

atypical for this segment, as large companies usually have more formalised and predictable budget planning.

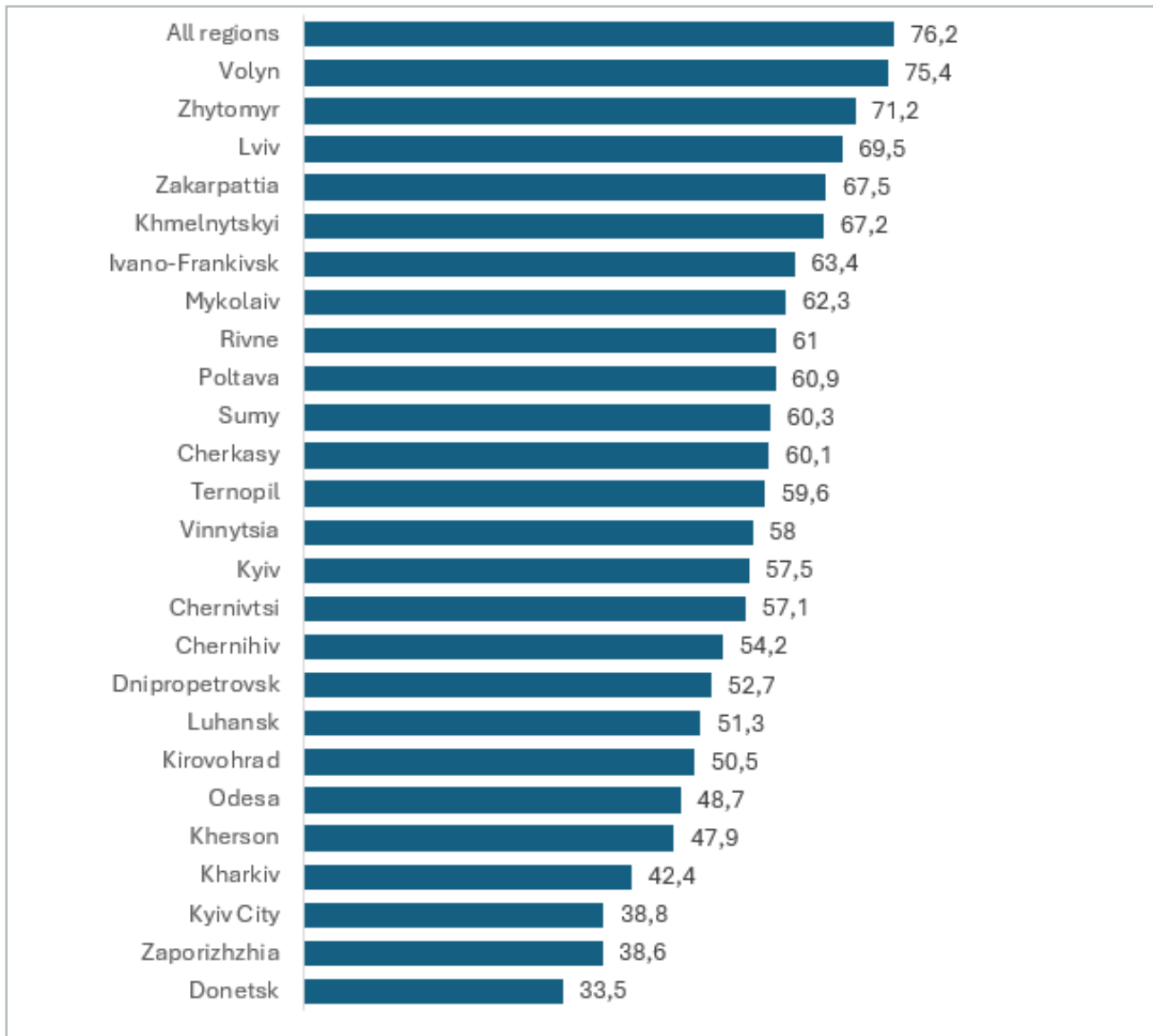


Fig. 44. Percentage of enterprises planning wage increases, by region

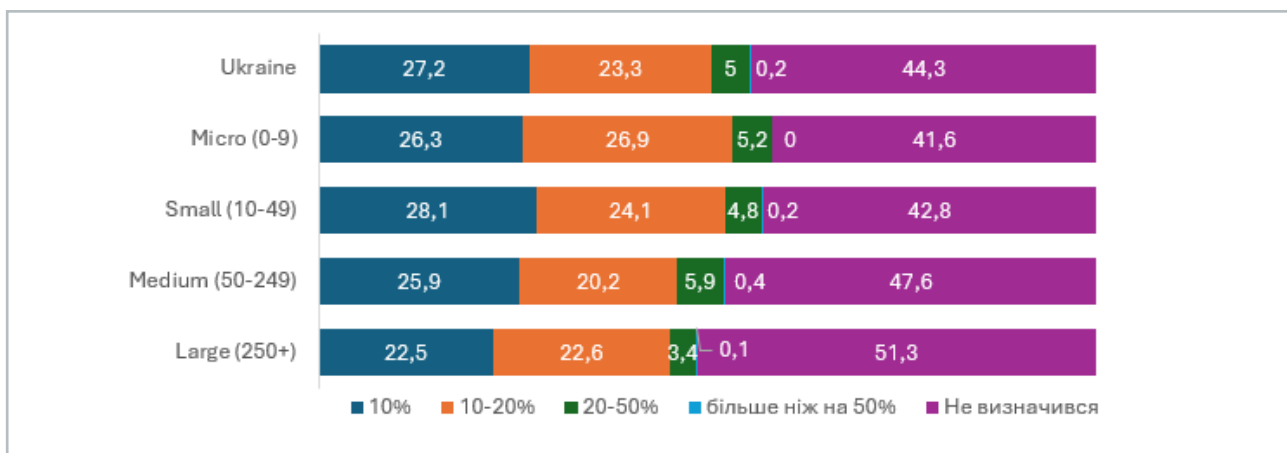


Fig. 45. Percentage of enterprises planning to increase wages, by size

Among sectors, financial activities, IT, and education stand out, where the share of increases in the 20–50% range is relatively higher, which may reflect competition for scarce specialised staff (Fig. 46).

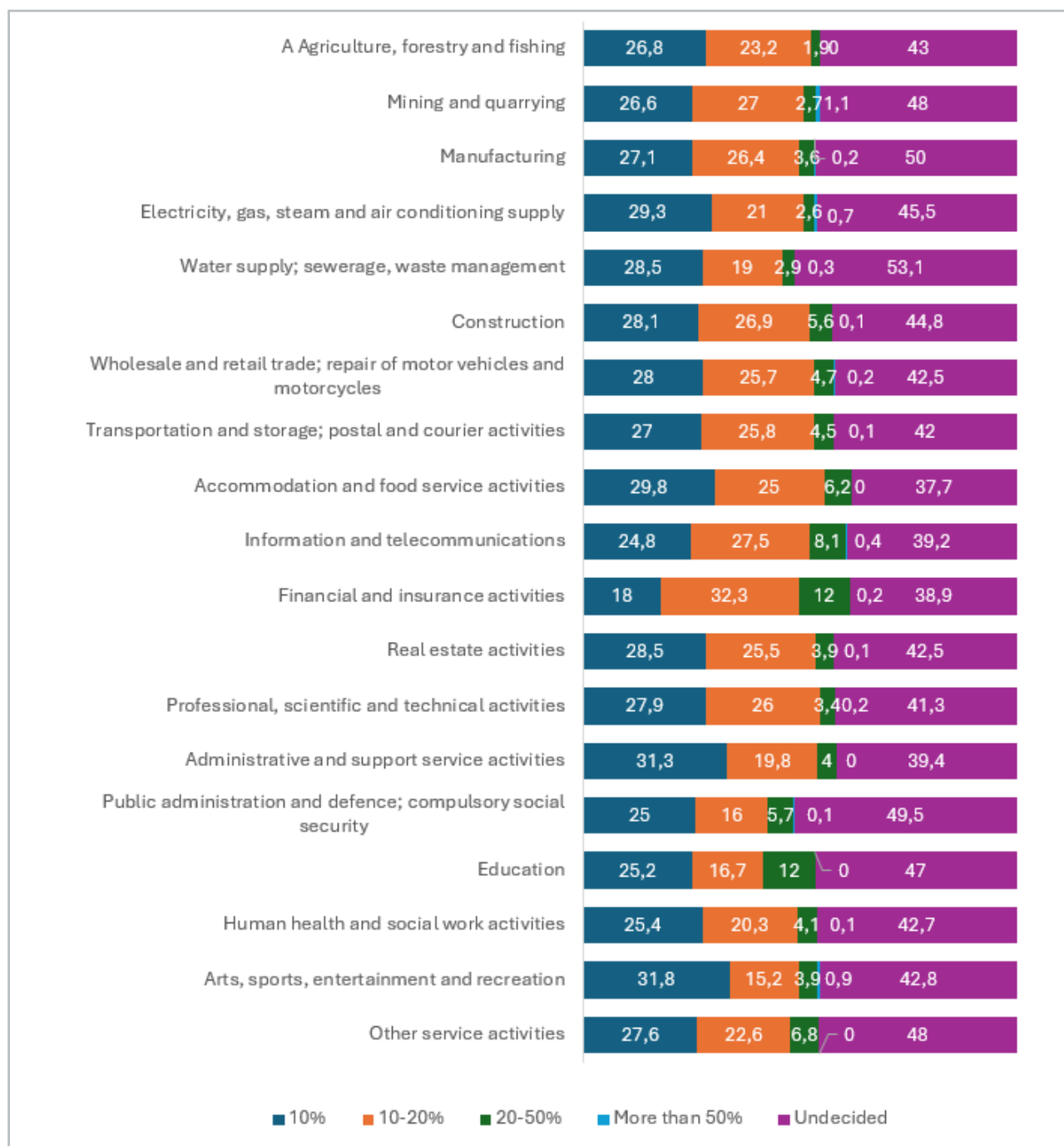


Fig. 46. Planned wage increase size, percentage of those planning an increase, by sector

Regionally, more “aggressive” increases are more often declared in Chernivtsi, Kyiv City, and Ternopil oblasts, while in a number of eastern and southern regions uncertainty regarding the size of increases prevails, indicating cautious business expectations (Fig. 47).

Such cautious approaches to wage increases mean that even in conditions of acute staff shortages employers try to spread costs gradually, avoiding sharp growth in the wage bill.

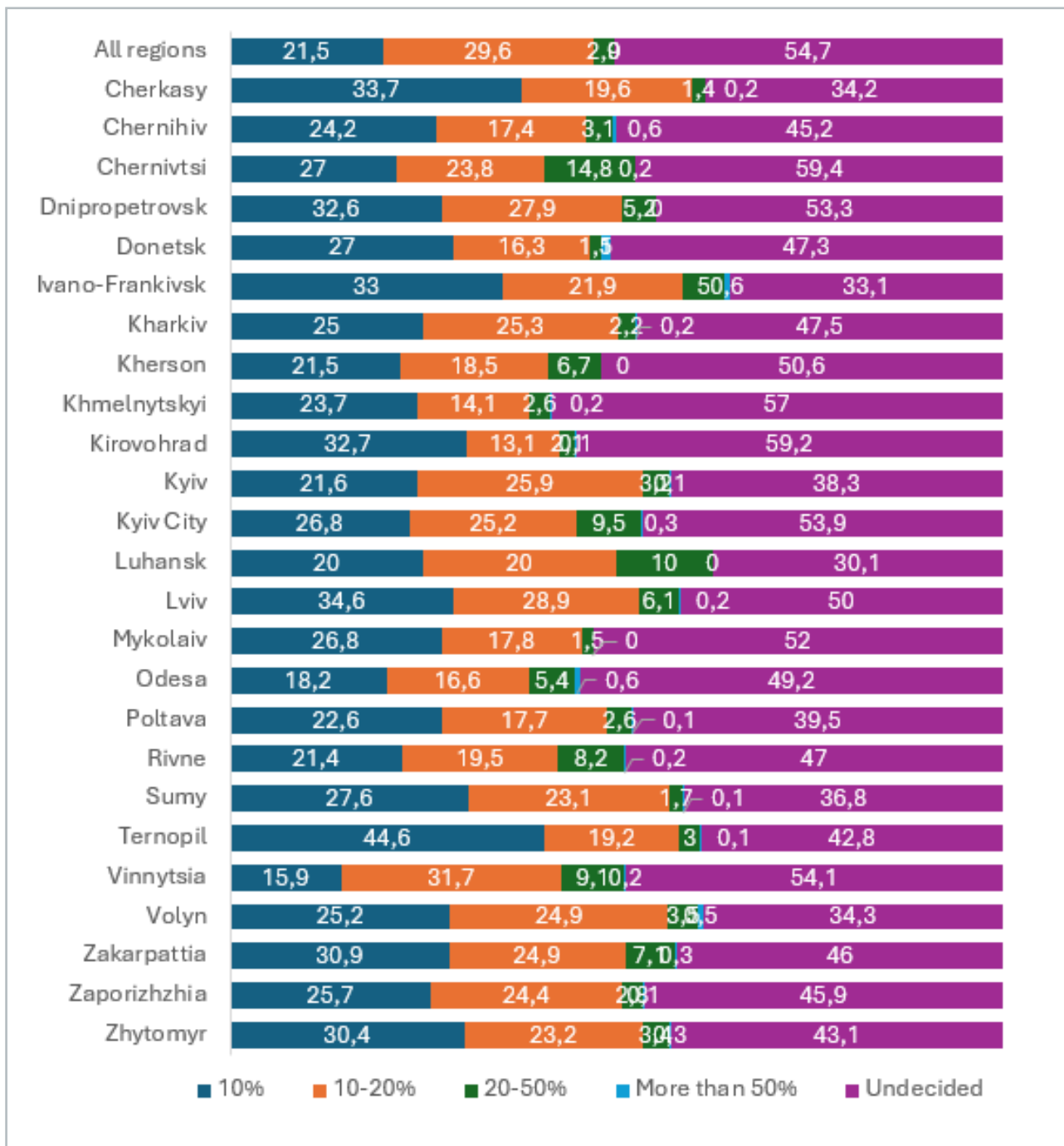


Fig. 47. Planned wage increase size, percentage of those planning an increase, by region

3.4. SOCIAL SUPPORT

Against this background, the importance of social support as a staff retention tool is increasing. In 2025, it was offered by 51.2% of enterprises compared to 48.7% in 2024, with large enterprises (78.0%) significantly ahead of small and micro ones (Fig. 48). The most common forms are organisation or compensation of commuting to work, payment for communication services, training, as well as medical and psychological support (Fig. 49). Psychological support moved to first place specifically in 2025, due to high demand and relatively low cost. This structure of social packages indicates that employers seek to reduce employees' indirect costs and increase staff loyalty in conditions where opportunities for rapid wage growth remain limited.

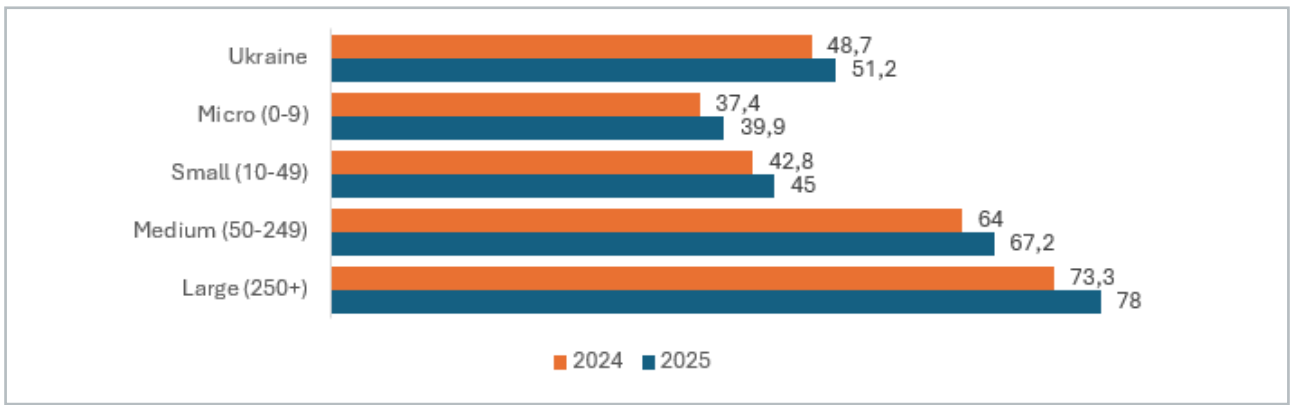


Fig. 48. Percentage of enterprises that provided social support

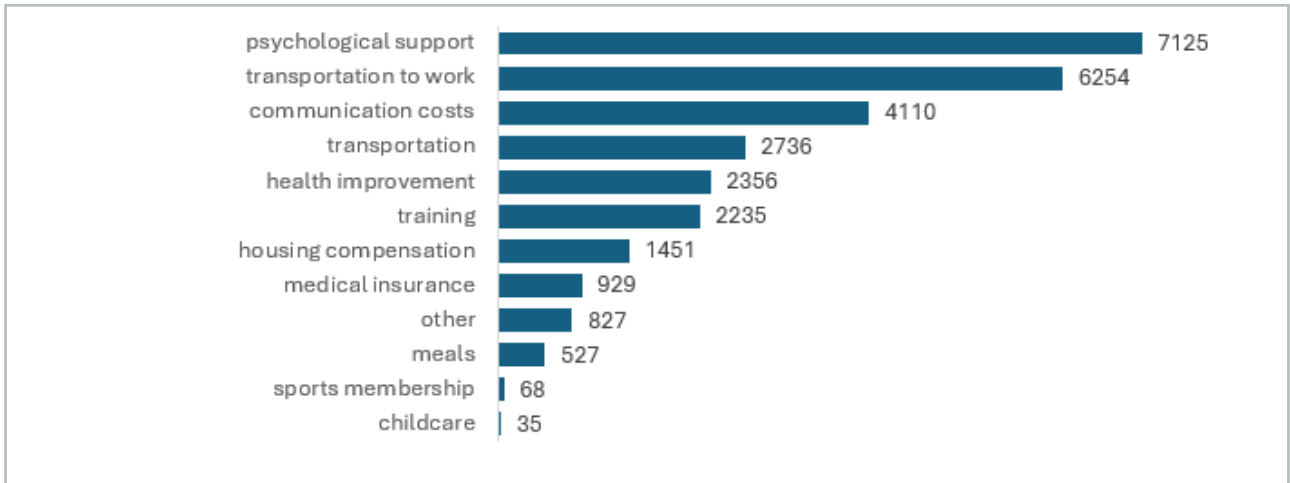


Fig. 49. Frequency of mentions of forms of social support



Image from Freepik

4. COOPERATION WITH the SES

Analysis of respondents' answers regarding enterprises' cooperation with the State Employment Service (SES) indicates a significant strengthening in 2025 – the share of enterprises cooperating with the SES increased from 74.6% in 2024 to 83.0% in 2025 (Fig. 50).

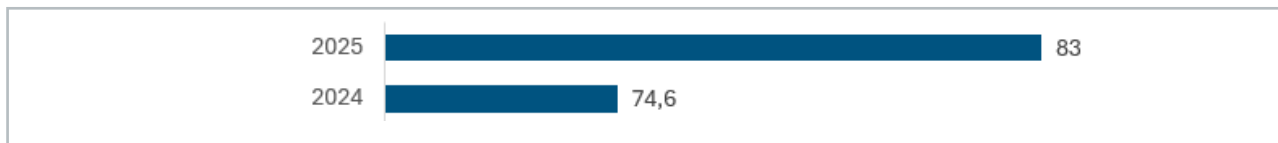


Fig. 50. Percentage of enterprises cooperating with the State Employment Service

By enterprise size, there is a clear differentiation in the level of cooperation: large enterprises show the highest engagement (93.5%), while micro (77.6%) and small (80.0%) enterprises demonstrate the lowest rates, which is explained by limited administrative resources and a lower need for formalised recruitment tools. Regionally, the highest cooperation shares were recorded in Ternopil (98.2%), Kirovohrad (97.8%), and Vinnytsia (97.4%) oblasts, while Kyiv City (29.5%) has the lowest level of interaction with the SES, likely due to the active use of private recruitment services, internal HR channels, and the city's attractiveness for workers. The sectoral distribution is also uneven: agriculture (93.9%), public administration (93.5%), and water supply (93.3%) cooperate most actively with the SES, while financial activities (57.9%), information and telecommunications (60.1%), and professional, scientific and technical activities (68.7%) show the lowest engagement levels, reflecting different degrees of reliance on public labour market instruments across sectors.

The quality of cooperation is assessed as consistently high: the average score increased from 4.7 to 4.8 points (5 being the highest score), with no statistically significant differences by enterprise size. At the same time, regional differences are substantial: the highest ratings (almost 5 points) were recorded in Sumy, Ternopil, and Kirovohrad oblasts, while Kyiv City, Khmelnytskyi, and Kyiv oblasts have the lowest values, which correlates with the actual share of enterprises engaged in cooperation with the SES.

The structure of cooperation areas in 2025 remains relatively stable: candidate matching dominates (72%), although its share decreased compared to 2024, while the role of seminars and trainings increased (from 21% to 27%) and consultations on legislation increased (from 61% to 66%), indicating a gradual shift from a purely recruitment-focused model towards a service and advisory model of interaction (Fig. 51).

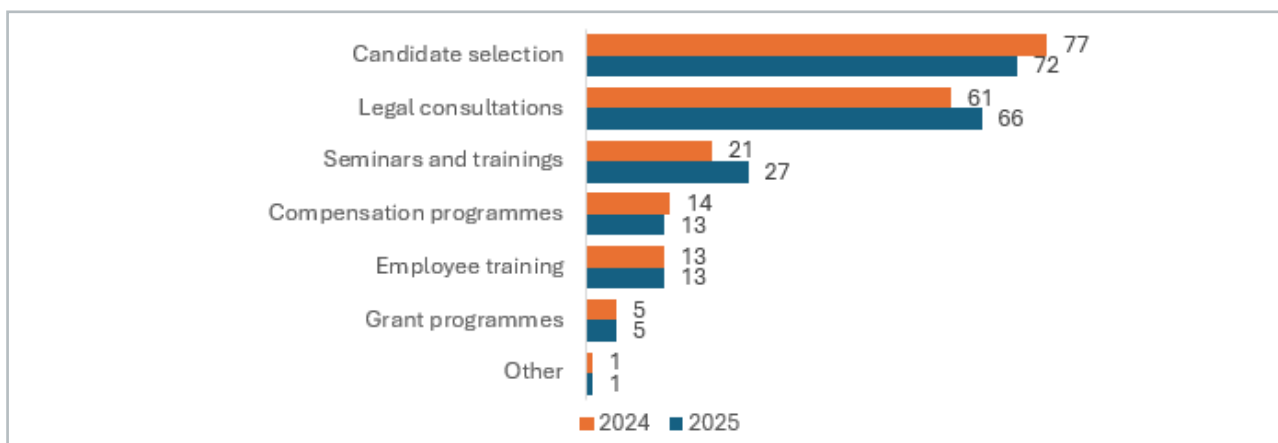


Fig. 51. Areas of cooperation with the SES, percentage of enterprises having such cooperation

At the same time, the ratings of specific areas (maximum possible score – 5) show a clear pattern: consultations on legislation (4.27) and candidate matching (4.15) receive the highest scores. That is, the areas used most frequently are rated better, suggesting a moderately positive correlation between the intensity of tool use and satisfaction with it. Less common areas – grant programmes (3.81) and employee training (3.89) – receive lower ratings, likely due to more complex procedures and delayed effects (Fig. 52)



Fig. 52. Assessment of areas of cooperation

Reasons for the absence of cooperation with the SES in 2025 remain almost unchanged compared to 2024. The absolute dominant response is “no need” (85%), which indicates not a negative perception of the Service, but rather the use of alternative recruitment channels or the absence of hiring needs (Fig. 53). At the same time, 7% of respondents note that cooperation creates additional administrative burden, and 4% report negative prior experience, signalling potential for simplifying procedures and improving the service component.

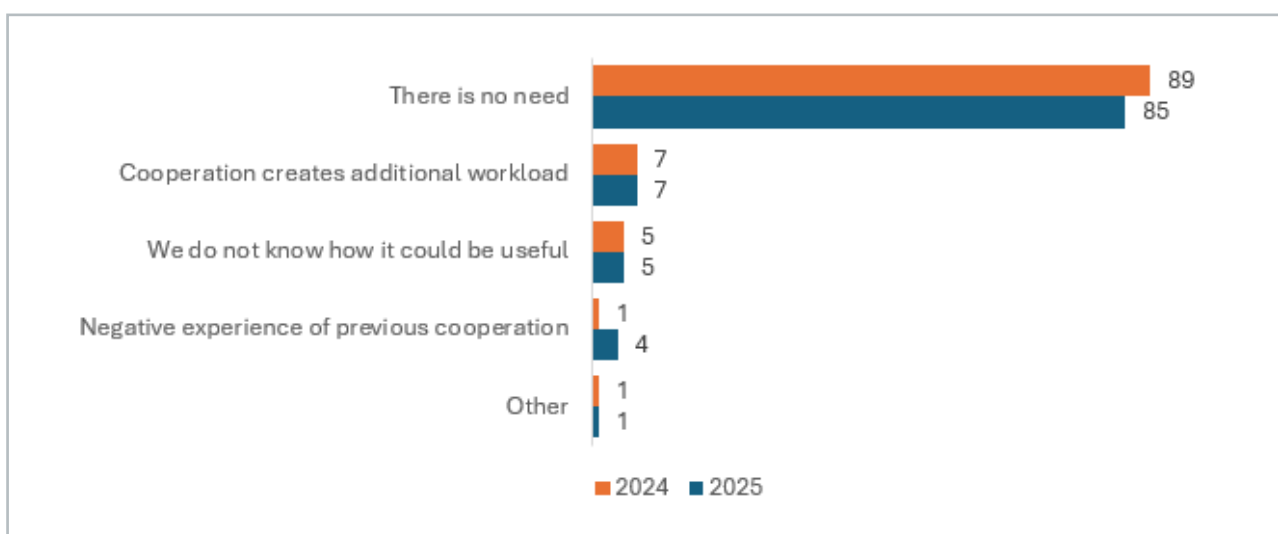


Fig. 53. Reasons for the lack of cooperation with the SES, % of enterprises that do not cooperate

Data on demand for additional information confirm this: interest in candidate matching and legal consultations increased, while the share of enterprises that do not need additional information rose sharply to 58.7%, which may indicate saturation of enterprises’ basic information needs (Fig. 54).

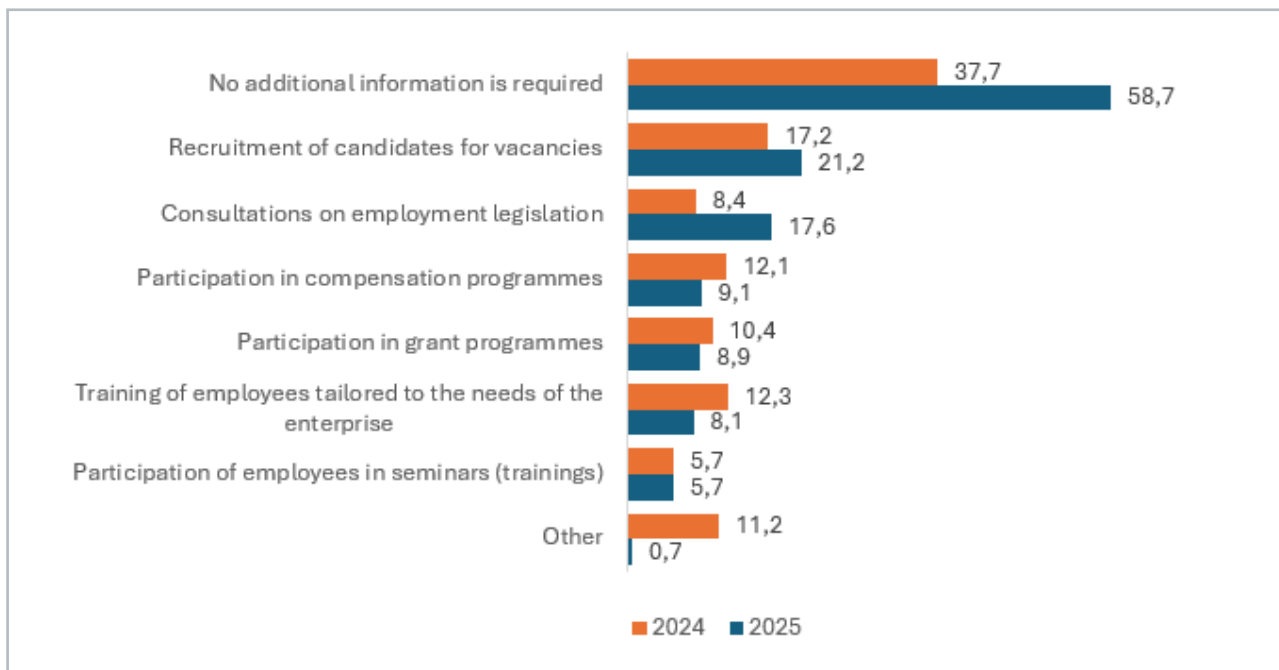


Fig. 54. Reasons for the lack of cooperation with the SES, % of enterprises that do not cooperate

5. RESEARCH METHODOLOGY

The Labour Market Research of Ukraine was conducted based on a combination of quantitative and qualitative methods and the use of several complementary data sources. Key organisational procedures for collecting primary information were carried out by specialists of the State Employment Service, ensuring a unified approach, comparability of results, and quality control during the field stage..

The methodology provided for summarising and analytically interpreting information across the following main components:

Analysis of official statistical and administrative data reflecting macroeconomic conditions and factors shaping labour supply and demand dynamics. Within this component, indicators of the overall economic situation (including GDP, inflation, production indicators), structural enterprise statistics, the occupational and age structure of employment, vacancy parameters, and the distribution of demand by occupation were processed. Comparisons over time and across regions were also conducted.

The employer survey covered the collection of standardised data on the enterprise, the structure of employment by occupational groups and age, representation of vulnerable categories and gender aspects, forms of work organisation and working-time arrangements, experience and reasons for recruitment difficulties and the impact of the war (including damage to the enterprise), dynamics and expectations regarding production/sales volumes, hiring practices and wage increases in 2025 and plans for 2026, staff training practices and attitudes towards education documents and qualification recognition, social support programmes for employees, and experience of cooperation with the State Employment Service.

Based on the integration of statistical analysis and survey data, a coherent picture of labour market trends was developed, including the relationship between macroeconomic changes, the employment structure, and employers' needs..

In 2025, the sample of the National Labour Market Survey of Ukraine expanded significantly compared to 2024. The number of employers covered increased from 55 thousand to almost 61 thousand, and the number of employees working at the surveyed enterprises – from 4.2 million to 4.4 million people. The expansion of coverage did not significantly change reliability, but at the same time slightly shifted the structure of results towards the groups that were engaged more actively (in particular, SMEs). Enterprises in certain types of economic activity that are directly or indirectly related to the defence industry were not included in the population and the survey sample.

The increase in the number of respondents was primarily driven by more active engagement of micro and small enterprises. The number of micro enterprises in the sample increased from 3.0 to 3.8 thousand, and small enterprises – from 37.0 to 40.8 thousand. Medium-sized enterprises showed a slight increase (from 13.0 to 13.6 thousand), while large enterprises remain the least represented, despite an increase in their number from 2.0 to 2.8 thousand.

A similar trend is observed for the number of employees covered. The highest growth rates were recorded among micro enterprises – from 19 to 28 thousand people. In small and medium-sized business the growth was moderate (small: from 794 to 857 thousand; medium: from 1,253 to 1,332 thousand people), while for large enterprises it was minimal – from 2,134 to 2,184 thousand. Overall, the sample structure in 2025 shifted somewhat towards micro and small employers, without substantial changes in the representation of medium and large enterprises.

The survey was conducted in September–October 2025 by employees of employer services and recruitment departments of raion branches of oblast employment centres. Specialists invited employers to participate, sent links to an online questionnaire for self-completion and/or conducted interviews by phone.



Image from Freepik

As last year, in large and medium-sized enterprises the questionnaire was mainly completed by managers or HR specialists. By contrast, micro and small enterprises most often responded through managers (owners) or accountants. Given that the majority of respondents were managers, it can be assumed that the responses obtained fairly reliably reflect the current situation at enterprises and their plans for 2026.

Overall for Ukraine, the sample provides very high precision – a margin of error of about ± 0.39 p.p.; at the regional level, in 22 of 25 oblasts the margin of error does not exceed ± 3 p.p., while Donetsk ($\approx \pm 4.00$ p.p.), Kherson ($\approx \pm 4.79$ p.p.) and especially Luhansk ($\approx \pm 15.58$ p.p., because $n=39$) require cautious interpretation due to the small number of responses (Table 5). Some respondents indicated that they conduct economic activity in all regions of Ukraine rather than in individual oblasts. In the figures, such responses are marked as “All regions”.

Region	Sample (n)	Population (N)	Coverage (n/N)	Margin of error ¹ , 95% (\pm p.p.)
Vynnytsia	3 152	70 561	4,5%	1,71
Volyn	1 727	47 850	3,6%	2,32
Dnipropetrovsk	5 235	162 315	3,2%	1,33
Donetsk	585	21 499	2,7%	4,00
Zhytomyr	1 910	51 385	3,7%	2,20
Zakarpattia	1 586	43 541	3,6%	2,42
Zaporizhzhia	1 914	46 367	4,1%	2,19
Ivano-Frankivsk	2 129	58 974	3,6%	2,09
Kyiv	4 219	124 374	3,4%	1,48
Kirovohrad	1 704	38 441	4,4%	2,32
Luhansk	39	2 568	1,5%	15,58
Lviv	4 607	144 099	3,2%	1,42
Mykolaiv	1 386	46 264	3,0%	2,59
Kyiv City	8 132	309 008	2,6%	1,07
Odesa	3 858	120 146	3,2%	1,55
Poltava	2 445	65 241	3,7%	1,94
Rivne	1 975	50 512	3,9%	2,16
Sumy	1 553	39 968	3,9%	2,44
Terнопil	1 627	39 927	4,1%	2,38
Kharkiv	3 119	134 711	2,3%	1,73
Kherson	407	14 823	2,7%	4,79
Khmelnyskyi	2 103	60 474	3,5%	2,10
Cherkasy	1 957	51 763	3,8%	2,17
Chernivtsi	1 121	39 607	2,8%	2,89
Chernihiv	1 599	40 675	3,9%	2,40
TOTAL Ukraine²	60 089	1 825 093	3,3%	0,39

Table 5. Population size, sample size, and margin of error by region

Notes:

1. The margin of error is calculated for proportions in the “worst-case scenario” $p=0.5$ and with the finite population correction (FPC).

2. The overall figure for “TOTAL Ukraine” does not match the total number of respondents, as 811 respondents indicated that they operate not in a specific region, but across the entire territory of the country.



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